



IOC

INTERNATIONAL OLIVE COUNCIL **NEWSLETTER**

Nº 164
JUNE 2021
ENGLISH





A GOOD TEAMWORK

IOC President George Svanidze, the College of directors Abdellatif Ghedira (ED), Jaime Lillo and Mustafa' Sepetci (Deputies), with some of the international officials of the IOC Executive Secretariat a few days before the next IOC Council meeting.

IN THIS ISSUE

- IOC AGENDA: 113th session of the Council of Members
- Webinar with Pakistan
- Summary activities reports:
 - Chemistry and Standardisation Unit
 - Economy and Promotion Unit
 - Technical, Olive Growing and Environmental Unit
- Observatory and IT System Department
- Focus – table olive imports
- World trade in olive oil and table olives
- Producer prices



THE NEXT VIRTUAL SESSION: MONDAY 28 AND WEDNESDAY 30 JUNE 2021



MADRID / The countdown to the next session of the Council of Members has begun. The 113th session will take place on Monday 28 and Wednesday 30 June 2021.

Once again, the 113th session will take place entirely online. Despite the pandemic, the Executive Secretariat has been able to carry out its institutional and operational activities without interruption and will continue as planned when things return to normal. This means all the programmes approved by the Council of Members have been respected.

Like last year, the session is limited to the meeting of the Administrative and Financial Affairs Committee and the plenary session. A break in proceedings, on 29 June, will allow the Executive Secretariat to make any changes suggested by the Council of Members to the various Unit reports. Discussions between delegations will take place online and the Executive Secretariat will manage the international platform for simultaneous interpretation from the headquarters building. The session will be preceded by the 56th Advisory Committee meeting, which will take place virtually from IOC headquarters on 22 June 2021.

News and updates from the 113th session and the 56th Advisory Committee will be shared through our website and the July newsletter.

FIRST CONTACT BETWEEN PAKISTAN AND THE IOC



MADRID / The International Olive Council approached Pakistan to enquire about its plans to develop the Pakistani olive sector.

The two parties agreed to hold a virtual meeting to discuss the Pakistani olive sector. On 27 May 2021, a videoconference was held between the senior trade officer of the Embassy of Pakistan, officials



from various Pakistani ministries in charge of the olive sector and the Director General of the Agro-Food Division at the Trade Development Authority of Pakistan Abdul Karim Memon. The IOC Executive Secretariat was represented by its Executive Director, Abdellatif Ghedira, and several IOC officials.

After introductory speeches by the two senior officials, the Pakistani party presented an overview of the country's olive sector, its development and prospects. He spoke of the Pakistani government's commitment to increasing its olive production, modernising its facilities and improving the quality of its olive prod-



ucts.

The Deputy Executive Director for operational activities and his heads of unit presented the mission of the IOC and its activities, outlining what the Organisation could offer, should Pakistan become a member, in terms of expertise and technical assistance to contribute to the success of the Pakistani

government's development plan.

The Head of the Legal Department of the IOC then explained how to join the Organisation. He was followed by the Head of the Observatory Department, who gave an overview of this informative tool and stressed its importance.

At the end of the presentations, Dr Muhammad Azeem Khan, Chair of the Pakistan Agricultural Research Council, thanked the Executive Secretariat for organising the meeting. He also expressed his satisfaction with the dialogue initiated between the two parties and his wish to see his country join the IOC.

Both parties left with the commitment to continue their talks through the economic and commercial section of the Pakistani Embassy in Madrid.

CHEMISTRY & STANDARDISATION UNIT

By Standardisation and Research Unit

MADRID / This Unit is responsible for drawing up and updating standards relating to the physico-chemical and organoleptic characteristics of olive oils, olive-pomace oils and table olives (including the methods of analysis of the parameters mentioned in the standards).

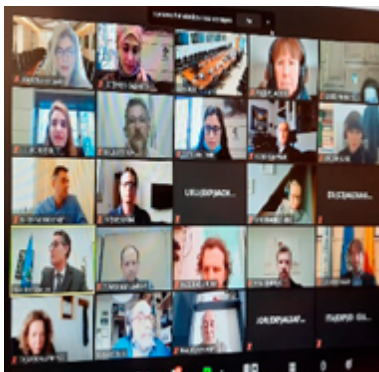


Since the 112th session in November 2020, despite the pandemic, all the activities planned in the calendar and approved by the Council of Members have taken place:

- Organisation of meetings on the composition of oils with non-standard parameters and on the possible presence of contaminants; meetings of chemistry experts and experts on the organoleptic assessment of virgin olive oils; meetings on quality strategy and table olives; meetings of the Technical Commission for the control of the competence of laboratories; and meetings of the Technical Commission group on nutrition. All meetings were held virtually, given the restrictions on travel because of the pandemic.
- Organisation of the first harmonisation workshop for IOC-accredited panels, which took place from 14 to 18 December 2020 by videoconference. The Executive Secretariat sent the samples to the participating panels beforehand. A varied programme over five days was followed by tasting oils with positive and negative attributes, samples with median at the borderline and discovering varieties from different countries. The objective of this workshop was to reduce discrepancies between the accredited panels and to ensure harmonisation.
- Active participation of the IOC as an observer in the electronic working group (eWG) on the revision of the Codex standard by responding to questionnaires. The IOC also attended the eWG meeting as well as the eWG (7 July 2021) and the CCFO (October 2021).
- Continued organisation of videoconferences to ensure progress in the work of the different eWGs, as well as with the organising committee of the second harmonisation workshop for IOC-approved tasting panels. This will take place virtually in September 2021.
- Organisation of ring trials to validate methods of analysis of quality and purity (authenticity) parameters of olive oils and olive pomace oils such as ethanol/methanol, stigmastadienes, phenols and waxes.
- Preparation of questionnaires on oils with non-standard parameters, such as fatty acids, alpha-tocopherols, total sterols, etc.



Organisation of the first harmonisation workshop



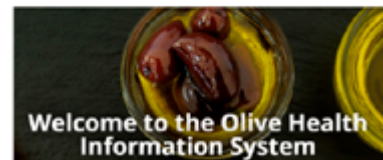
Organisation of videoconferences



- Organisation of inter-comparison tests to check the competence of physico-chemical and organoleptic analysis laboratories in order to obtain IOC approval for the period from 1 December 2021 to 30 November 2022.
- Presentation of the results and conclusions of the Oleum project in October 2021.
- Preparation and organisation of the expert meetings scheduled for the second half of the year.
- Organisation of the 21st Mario Solinas Quality Award 2021. The results of the winning and finalist oils are available at the following link: www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/#national-competitions.
- Institutional sponsorship of national competitions organised by the authorities (requests were received from Argentina, Portugal, Tunisia and Turkey).
- The IOC's response to the public consultation on NutriScore.
- Follow-up and publication of the OHIS scientific information newsletter for consumers and scientists under an agreement with the University of Navarra (sign up here: <https://meddietolivehealth.com/news-by-topic/>)
- Follow-up of the agreement with the Culinary Institute of America.
- Self-monitoring of oils on the market in non-member importing countries.



Mario Solinas Quality Award



OHIS scientific information newsletter

The Standardisation and Research Unit goes into the second half of 2021 with a rich programme of activities. For more news, click here: www.internationaloliveoil.org/what-we-do/chemistry-standardisation-unit/.



ECONOMIC & PROMOTION UNIT

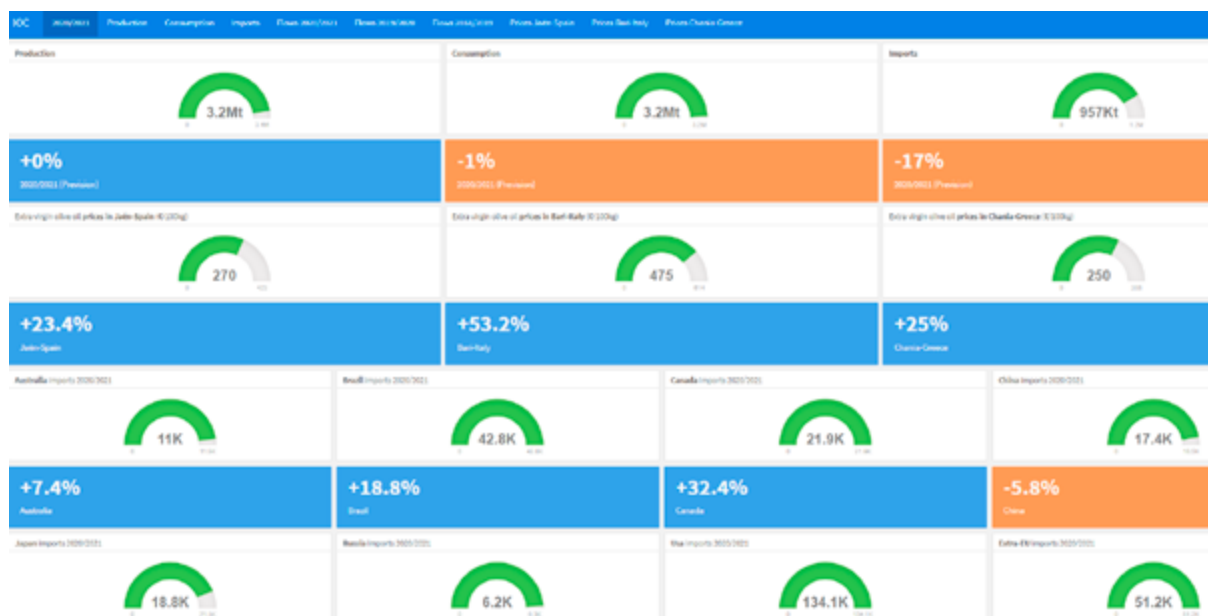
By Economic and Promotion Unit – Economic Studies and Statistics Department

MADRID / Economic activity is regulated by the International Agreement on Olive Oil and Table Olives 2015. Among the objectives of the Agreement are conducting studies, interpreting the world balance sheets on olive oil, olive pomace oils and table olives, and proposing appropriate measures. The IOC is also responsible for sharing its analysis of data from the olive product markets and for providing its Members with the necessary indicators to ensure those markets run smoothly.

ON THE MARKETS

The Economic and Promotion Unit monitors and analyses the olive product markets (olive oils, olive pomace oils, table olives, and other oils and fats). This involves:

- Updating the IOC database on the markets for olive oils, table olives and other edible liquid vegetable oils and fats around the world;
- Examining market conditions;
- Monitoring olive oil and table olive imports in the countries in which the IOC carries out promotional activities;
- Conducting retrospective and prospective studies on the olive markets;
- Monitoring national olive-growing areas and the world distribution of olive resources;
- Monitoring policies on the production, marketing, domestic consumption and international trade of olive products and other national development policies;
- Following up on bilateral or multilateral agreements between countries on the trade of olive oil and table olives; and
- Following up on surveys, studies and economic research on the olive sector.



Graph I – The monthly dashboard developed by this Unit and available on the IOC website.
<https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#prices>.

AT THE IOC

The Unit carries out market studies and other economic analyses and statistical work on the olive oil and table olives sector upon request by IOC members.

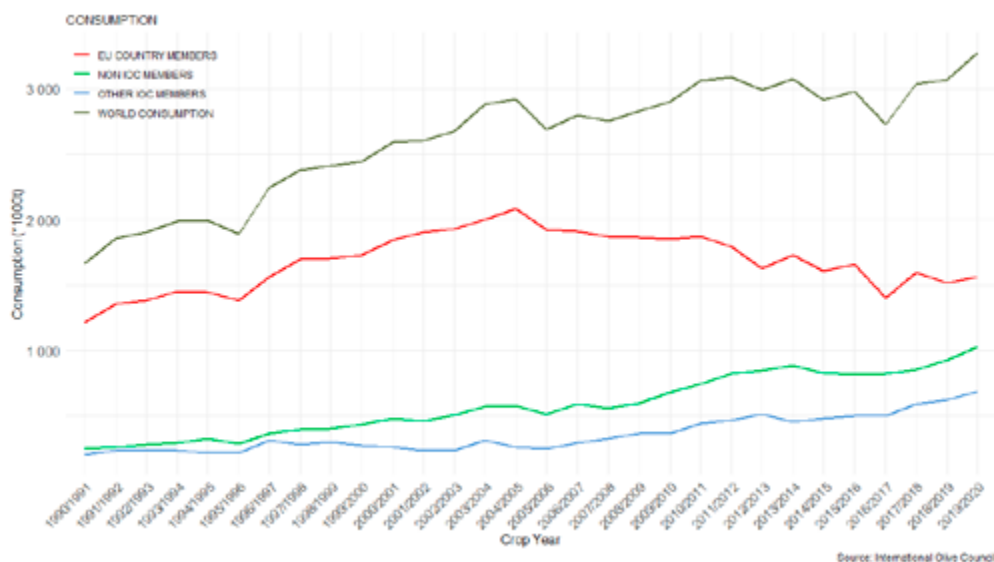
In 2020, a **study on consumer behaviour** was launched to analyse the consumption of olive oil in member countries, which has undergone significant changes in recent years.

World consumption has fluctuated remarkably since the 1990/91 crop year. The main feature is rising consumption in non-IOC countries, which has increased steadily from about 14% to 30% of world consumption in previous decades.

On the other hand, consumption in the EU has been falling since the 2004/05 crop year, from around 70% of the world total in 2004/05 to around 50% at present.

When consumption started to fall in the EU, it increased in the rest of the world.

The **study on consumer behaviour** was therefore considered necessary to understand the variables involved in consumption and what caused its decline in some countries.



Graph II – Distribution of olive oil consumption.

For the study, researchers will review all the national and international data published on oil and fat consumption as well as secondary information from public and private sources. They will also conduct a representative survey using a structured questionnaire that consumers can respond to directly.

The objectives of this study are as follows:

- 1.To analyse the changes and trends in consumption in IOC member countries compared to other edible oils and fats to determine whether it has fallen in olive oils only, or whether there has been an overall reduction in fat consumption. As far as possible, the analysis will distinguish between extra virgin, virgin and olive oils. Factors of change in eating habits, especially those affecting consumption patterns, will also be examined.
- 2.To analyse consumer behaviour regarding edible oils and fats in general, and olive oil in particular, in IOC member countries to determine:
 - Use of olive oil at home (people who consume olive oil, people who don't, people who use olive oil only, people who use both olive and sunflower oils, etc.)
 - Reasons to not use olive oil.
 - Different ways of using oils and fats (frying, deep-frying, dressing, baking, stewing, etc.).
 - Why consumers choose oils or fats for different cooking techniques.
 - The perception of olive oils according to the qualities or benefits sought (price, quality, health, environment, taste, etc.).



- Points of sale and purchase terms, use of information and communication technologies.
- Brands and branding.
- The level of knowledge of the different types of olive oil on the market.
- Sources of information on food in general and olive oil in particular.
- The consumer's sensitivity to price, what they are willing to pay.
- Market segments according to sociodemographic and psychographic variables.
- Retrospective analysis of purchases, if they stopped buying oil, whether they will buy again or not.

The study is ongoing; in 2020, it will cover Spain, Italy and Greece, where consumption has fallen sharply. In 2021, it will cover Argentina, Egypt, Tunisia and Jordan. In 2022, the study will be completed and other countries will be studied.

AT THE EXECUTIVE SECRETARIAT

The Economic and Promotion Unit helps write articles on sector analysis for the IOC's Olivæ journal and reviews economic texts submitted by external authors. It also prepares economic and statistical information for the monthly newsletter.



THE WORLD OF OLIVE OIL AND TABLE OLIVES

Source: Economy and Promotion Unit



OLIVÆ CONTENTS

- 04 IOC Mission
- 05 Editorial
- 06 Olive 80th anniversary
an international agreement under 100 years
- 11 Country profiles of member states
 - ALBANIA LIBYA
 - ALGERIA MONTENEGRO
 - ARGENTINA MOROCCO
 - EGYPT PALESTINE
 - LA. PAK TUNISIA
 - ISRAEL TURKEY
 - JORDAN EU
 - LEBANON URUGUAY
- 44 The main import markets
- 48 The IOC: 80 years of standardisation
- 52 Synergy between olive growing, olive oil
technology and environment
- 58 The New dissemination tool of the IOC:
The Observatory

EXPORTS OF OLIVE OIL OUTSIDE OF THE EU

Spain, Italy, Portugal and Greece were the top exporters of olive oil in 2019, with a total of 1.1 million tonnes, representing 10.2% of the total olive oil production. The main importers were the United States, followed by China, Japan and the United Kingdom.

Country	2017	2018	2019	2020
Spain	280.0	280.0	280.0	280.0
Italy	150.0	150.0	150.0	150.0
Portugal	50.0	50.0	50.0	50.0
Greece	50.0	50.0	50.0	50.0
France	10.0	10.0	10.0	10.0
Germany	10.0	10.0	10.0	10.0
China	10.0	10.0	10.0	10.0
Japan	10.0	10.0	10.0	10.0
UK	10.0	10.0	10.0	10.0
Other	10.0	10.0	10.0	10.0
Total	580.0	580.0	580.0	580.0

Country	2017	2018	2019	2020
USA	100.0	100.0	100.0	100.0
China	50.0	50.0	50.0	50.0
Japan	50.0	50.0	50.0	50.0
UK	50.0	50.0	50.0	50.0
Germany	50.0	50.0	50.0	50.0
France	50.0	50.0	50.0	50.0
Italy	50.0	50.0	50.0	50.0
Spain	50.0	50.0	50.0	50.0
Other	50.0	50.0	50.0	50.0
Total	400.0	400.0	400.0	400.0

CONSUMPTION OF OLIVE OIL

In the 2019 campaign, 62.5% of the total olive oil consumed in the EU was produced in Spain and Italy, which have an estimated annual per capita consumption of 5.5 kg and 7.4 kg, respectively. The main importers were the United States, followed by China, Japan and the United Kingdom.



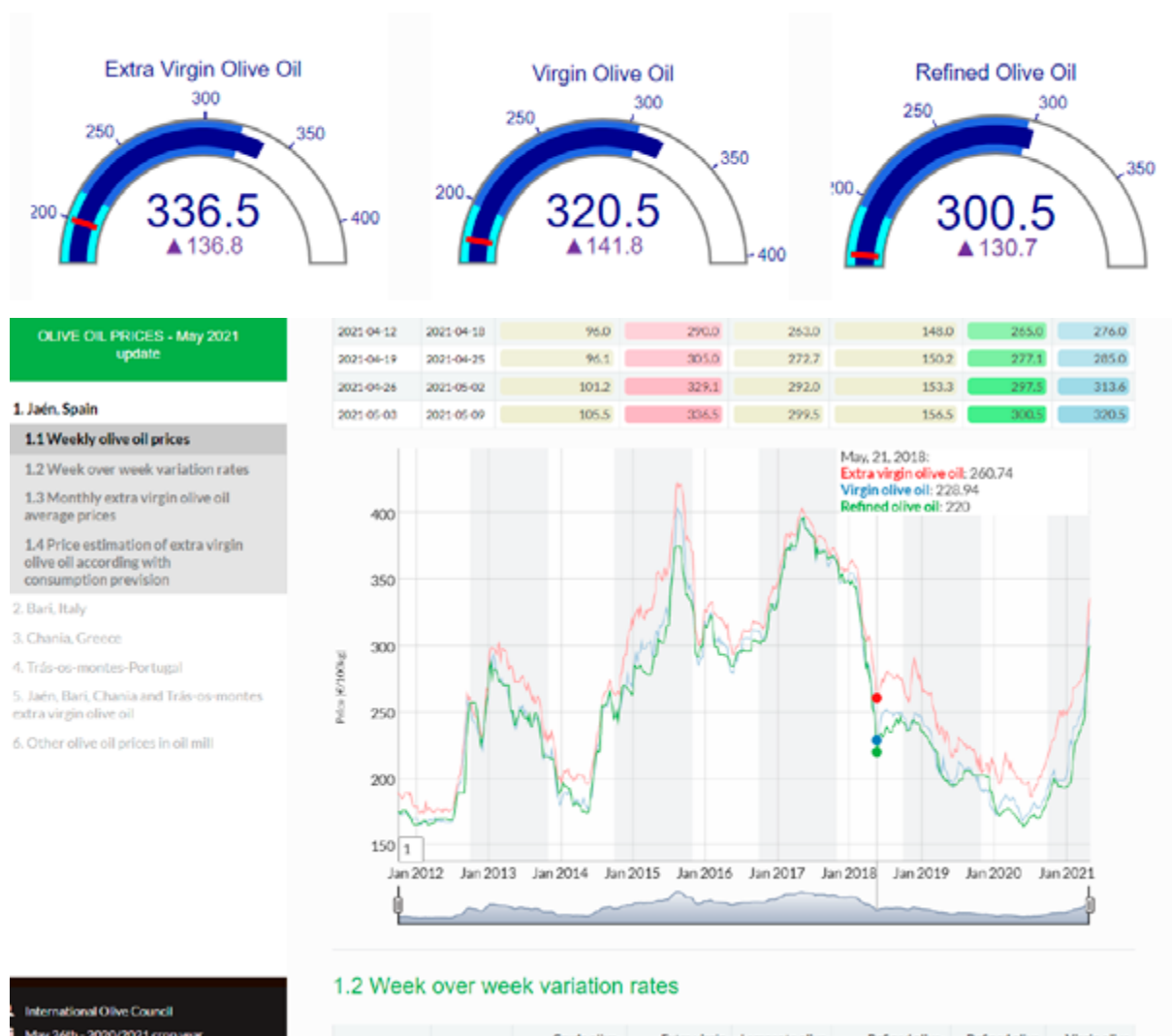
Country	2017	2018	2019	2020
Spain	100.0	100.0	100.0	100.0
Italy	50.0	50.0	50.0	50.0
France	50.0	50.0	50.0	50.0
Germany	50.0	50.0	50.0	50.0
UK	50.0	50.0	50.0	50.0
China	50.0	50.0	50.0	50.0
Japan	50.0	50.0	50.0	50.0
USA	50.0	50.0	50.0	50.0
Other	50.0	50.0	50.0	50.0
Total	400.0	400.0	400.0	400.0

Graph III – Images from the Newsletter and Olivæ magazine



PRICES

In 2020, to help our readers understand the international market, the Unit began publishing a monthly report on changes in producer prices of extra virgin olive oil, refined olive oil and refined olive pomace oil on representative markets. As these markets contribute to a large part of world production, their producer prices have a significant influence on prices in other markets.



Graph IV – Some images from the monthly price report, available on the IOC website,
<https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#prices>



BALANCE SHEETS

The Unit closely examines the olive oil and table olive markets and regularly makes a general estimate of the supply of and demand for olive oil and table olives. This is based on information provided by IOC members, as well as data provided by governments of non-member countries and any other relevant statistical material available.

IMPORTS AND EXPORTS





EXPORT FIGURES OF OLIVE OIL IN THE EUROPEAN UNION (EU-27)

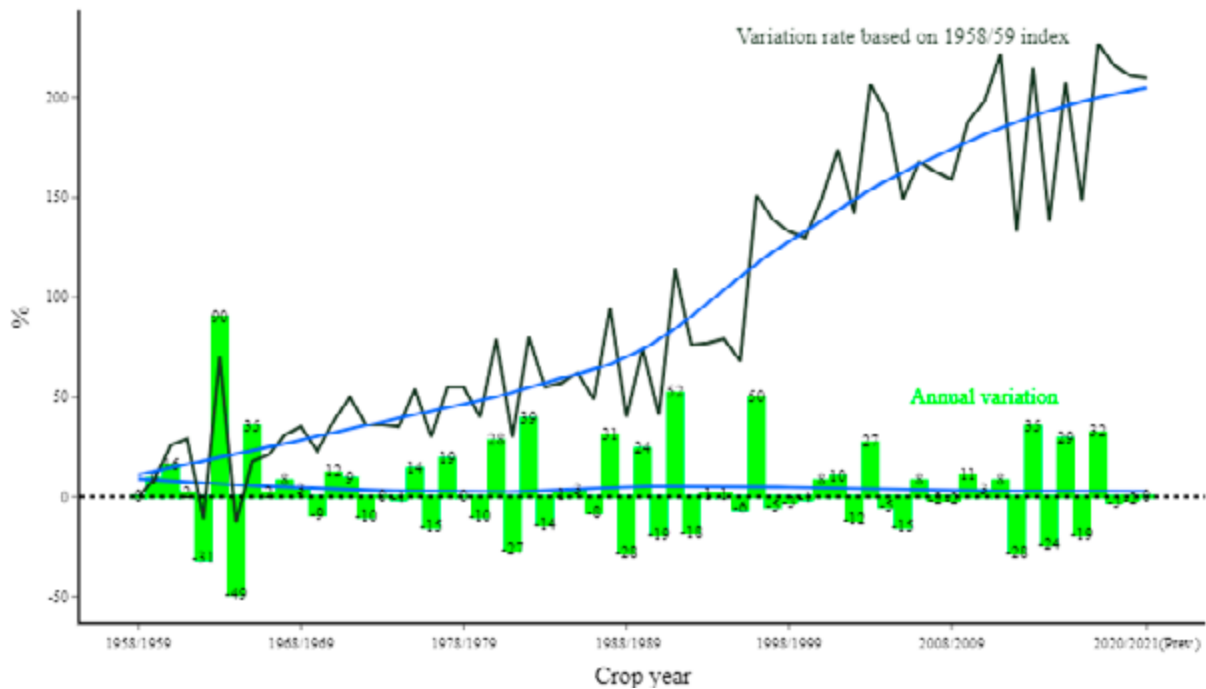
¹ notes

Greece, Italy, Portugal and Spain are the most representative olive oil exporters from the European Union to other countries. They cover around 70% of global olive oil exports and around 70% are extra virgin olive oil.

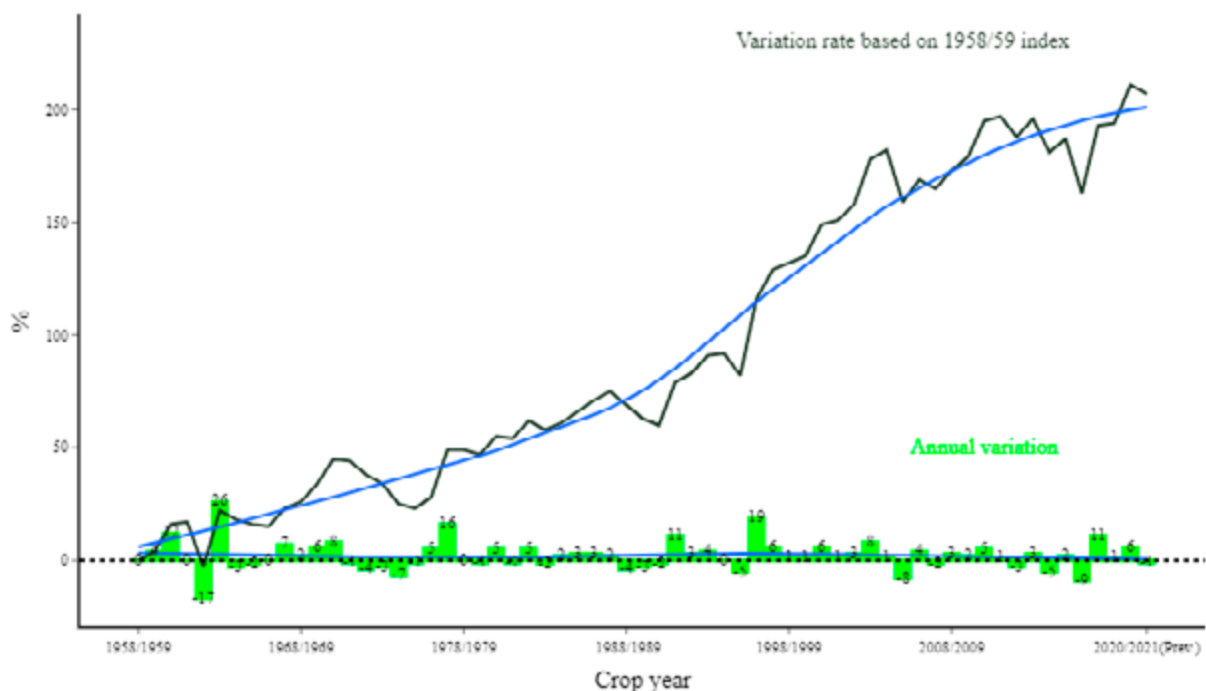
In the 2019/2020 crop year, extra-EU exports of olive oil reached 820 663 tonnes for an estimated value of €2.6922 billion (+15.8% and -0.1%, respectively, compared to the previous crop year). Intra-EU exports reached 1 056 941 tonnes for an estimated value of €2.6622 billion (+12.9% and -3.1%, respectively, compared to the previous crop year).

In December of the 2020/2021 crop year, the unit value index of extra-EU exports stood at 75 (+10% compared to the same period previous crop year or +3.6% compared to the previous month).





Graph VI – Evolution of olive oil production.



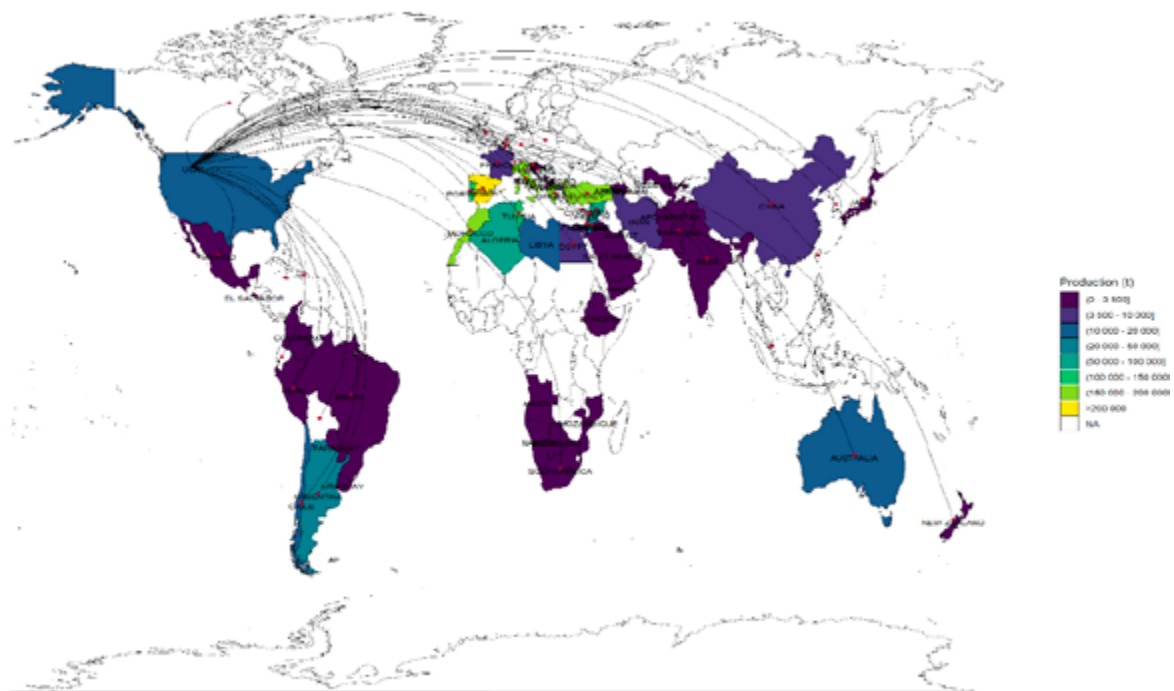
Graph VII – Changes in olive oil consumption



THE STATISTICS WORKING GROUP

The working group for monitoring statistics meets once a year to review the data produced by the IOC and, in particular, the olive oil and table olive balance sheets.

Olive oil imports to USA and olive oil production, 2018/19 crop year



Source: International Olive Council

PROJECTS COMPLETED IN 2020 AND NEW PROJECTS FOR 2021

New reports are being prepared and others are available on the IOC website. The aim is to provide relevant, regular and reliable statistical data that meet the demands of the sector and can be used around the world.



Some of the target lines of information are:

- To follow the imports and exports of olive oil on the main markets.
- To have a system for both producer and consumer prices as well as imports and exports.
- To obtain different estimates for value and volume on both the supply and demand sides.
- To draw up projects on olive oil and table olives.

The new reports are:

- A dashboard was created in 2020 to give a general overview of production, consumption, imports and their monthly flows, as well as olive oil prices. In 2021, this report will extend to table olives.
- A monthly report on olive oil producer prices was created in 2020 and a monthly report on export prices was created in 2021. Both are now available on the website.
<https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#prices>
- A monthly report disaggregating information on imports of olive oil and table olives in the main importing markets, available from May 2021.
- Annual reports on imports were created in 2020 and updated in 2021.
<https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#exports>.
- The results of the study on consumer behaviour in Spain, Italy and Greece should be available in 2021. The field phase has now begun in Argentina, Egypt, Jordan and Tunisia.
- The same study will be carried out in Argentina, Egypt, Tunisia and Jordan in 2021.

Estimates on olive oil and table olive projections are planned for 2021.

OLIVE GROWING, OLIVE OIL TECHNOLOGY & ENVIRONMENT UNIT

By the Olive Growing, Olive Oil Technology and Environment Unit

MADRID / The activities of the Technology and Environment Unit are outlined below. Activities were conducted in the field of olive growing, olive oil technology and technical cooperation. They aim at capacity building through technical support, training and technology transfer; establishing a network for the exchange of information on phytopathological and phytosanitary aspects of the olive tree; protecting the environment; conserving olive genetic resources and their positive effects in the face of climate change; and certifying olive nursery plants, which are currently being carried out.



TRUE HEALTHY OLIVE CULTIVARS PROJECT (THOC 2)

Work on the second phase of the TRUE HEALTHY OLIVE CULTIVARS (THOC2) project has begun with the signing of the agreement governing the project by the two parties involved: the Executive Director of the IOC, Abdellatif Ghedira, and the Rector of the University of Cordoba (UCO), José Carlos Gómez Villamandos. Several meetings were held between Luis Rallo Romero, the coordinator of the IOC network of olive germ-plasm banks; Abdelkrim Adi, the Head of the Olive Growing, Olive Oil Technology and Environment Unit of the IOC; and Catarina Bairrão Balula, the Head of the Technical Cooperation and Training Department of the IOC, to review the progress of the activities planned in 2021.



Executive Director of the IOC,
Abdellatif Ghedira



Rector of the University of Cordoba (UCO),
José Carlos Gómez Villamandos

At these meetings, they discussed the timetable for implementing the second phase of the project (THOC2), which aims to identify, sanitise and authenticate olive genetic resources, including the main varieties found in IOC member countries that are used in international trade, by facilitating their certification.





The Unit also organised a technical visit for a Libyan delegation to the international olive genetic resources collection of the UCO. This followed the bilateral meeting held at IOC headquarters with a delegation from the Libyan government led by the Libyan ambassador to Spain. The visit was an opportunity to include the Libyan variety Tripolitaine in the identification and characterisation work of THOC2.



The Libyan delegation gave the UCO laboratory DNA samples of 12 indigenous varieties and a plant sample of the Tripolitan variety.

WORKSHOP: OLIVE NURSERY CERTIFICATION SYSTEM

The workshop on the Olive Nursery Plant Certification System will be held at the international collection in Marrakech with the participation of all IOC olive germplasm banks.

The objective of this workshop is to discuss the adoption of a certification system based on the European regulation (as described in Article 91 of Regulation (EU) 2016/2031) that would improve the development of international trade in olive nursery plants, taking into account phytosanitary risks in the production of plants for planting at the international level.

The system will meet the requirements for managing quality, preventing pests (including *Xylella fastidiosa*), identifying critical points in the production chain and improving the phytosanitary knowledge of staff. It is voluntary and based on current EU and national regulations.



WORLD CATALOGUE OF THE MAIN GENETICALLY AUTHENTICATED OLIVE VARIETIES

Several exchanges and meetings with experts in the field have taken place to reflect on the structure and elaboration of the future World Catalogue of the main olive varieties genetically authenticated. This catalogue will be based on the morphological descriptors provided by the Union for the Protection of New Varieties of Plants as well as DNA morphological markers.

The last meeting was held virtually. The meeting provided Professor Diego Barranco from the UCO; Luis Rallo, the coordinator of the IOC germplasm bank network; and the Unit an opportunity to continue the discussions and organise the preparatory meeting for the World Catalogue of Genetically Authenticated Olive Tree Varieties, which will take place in Cordoba from 14 to 18 June 2021.



A first draft of the structure of the future catalogue has been prepared for discussion with the experts at the next meeting in Cordoba.

SEMINAR: THE OLIVE TREE AND CLIMATE CHANGE

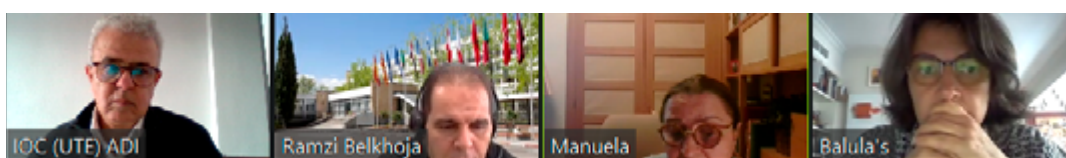
Most plants and soils will be impacted as the climate becomes increasingly hot and dry. Some phenomena due to climate change have been frequently observed in recent years, such as very severe drought in some areas of the world, winter cold deficit and water deficit, together with the intensification of alternation of some olive varieties.

In the Mediterranean basin, where most of the world's olive trees are grown, cultivated and wild genetic diversity can be an asset for adapting to climate change.

With the aim of finding appropriate solutions to mitigate this phenomenon, the Executive Secretariat and the Mediterranean Agronomic Institute of Zaragoza (IAMZ-CIHEAM) met to discuss and prepare the programme for a scientific debate that will be proposed within the framework of an international seminar entitled 'The olive tree and climate change'.



A meeting between the Technology Unit and the CIHEAM team in Zaragoza – the Head of Educational Programmes and the Coordinator of Plant Breeding Studies – was held to develop the programme for this activity, including the module on choosing the right olive variety in the light of recent climatic conditions. A draft programme has been prepared.



The progress of climate change and the measures to be adopted to mitigate its negative impact on olive growing and international olive production, including planting new cultivars and adopting certain agricultural practices, are some of the topics that will be discussed.

TECHNICAL COOPERATION AND TECHNOLOGY TRANSFER

The objective of these activities is to encourage research and strengthen skills in IOC member countries. They aim to disseminate IOC standards, train professionals in olive cultivation and olive technology, encourage research, meet the growing demand for specialists in the sector and facilitate technology transfer and the exchange of information and experience.

PHDS

The IOC awarded four scholarships to PhD students.

These scholarships, which aim to foster advanced training and research in the field of olive oil and table olive technology, were awarded to candidates nominated by IOC member countries.

The research topics proposed are related to the objectives of the International Agreement on Olive Oil and Table Olives 2015 (<https://www.internationaloliveoil.org/about-ioc/mission-basic-text/>):

‘Bioinformatics and genomics for olive adaptation to climate change: identification of markers associated with drought and the need for cold for flowering in order to select the most appropriate genotypes.’

Scholar: Laila AQBOUCH (Morocco)

Supervisors: Stéphanie Bocs and Bouchaid Khadari, UMR AGAP Montpellier



‘Epigenomic consequences of hydroxytyrosol consumption in cardiometabolic diseases.’

Scholar: Andrea DEL SAZ LARA (Spain)

Supervisors: Francesco Visioli and Alberto Dávalos, Universidad de Castilla-La Mancha

‘Food Safety in the Production of Virgin Olive Oils.’

Scholar: Akram CHARFI (Tunisia)

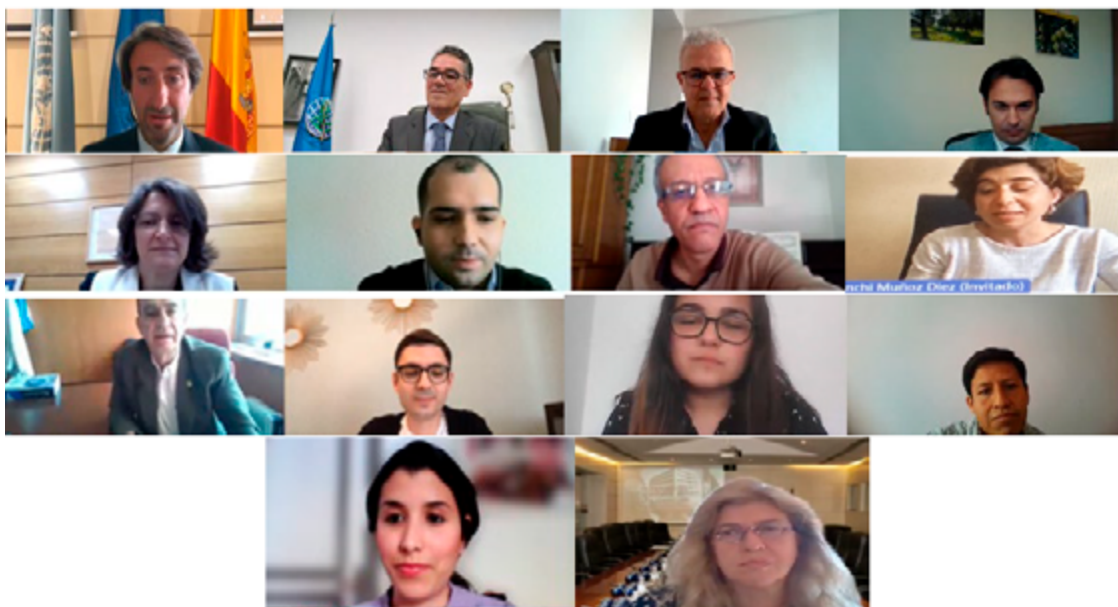
Supervisor: Sebastián Sánchez Villasclaras, Universidad de Jaén

‘Cold requirements, genetic regulation and modelling of the flowering process in olive cultivars (*Olea europaea* subsp. *europaea* var. *sativa*).’

Scholar: Rüstü Efe Değer (Turkey)

Supervisor: Diego Barranco Navero, Universidad de Córdoba

In order to launch the PhD programme and to inform their official representatives about the topics and the schedule for the next four years, the Technical Unit organised a virtual meeting with the thesis directors and the representatives of the universities that will host the four fellows.



MASTER'S DEGREE

The Master in olive growing and olive oil technology is jointly by the UCO, the Department of Agriculture, Fisheries and Rural Development of the Regional Government of Andalusia (CAP), the Andalusian Institute of Agricultural Research and Training (IFAPA), the Higher Council for Scientific Research (CSIC), the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM), the Patrimonio Comunal Olivarero and the IOC.

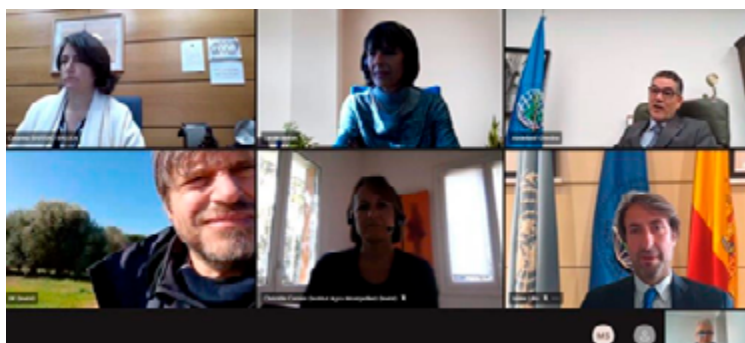


The analysis and selection of four candidates for the 2021/2022 edition of the Master's programme has been completed.

AGREEMENTS

INSTITUT SUPAGRO MONTPELIER-IOC:

The Executive Secretariat and the Institut National d'Enseignement Supérieur pour l'Agriculture, l'Alimentation et l'Environnement (Institut SupAgro Montpellier) have signed a Memorandum of Understanding to strengthen their scientific cooperation.



This MoU will establish closer links between the two institutions, encouraging exchange and collaboration programmes in olive-related areas of mutual interest.

One of the main objectives is to foster opportunities for innovation between scientific leaders, to encourage substantial cooperation in the areas of olive variety diversity, cropping systems and olive oil markets in the context of global change, including climate change, and to facilitate the exchange of information and plant material between olive germplasm collections.

FAO-IOC:

An agreement will be signed between the IOC and the FAO on 30 June 2021 for the joint programming, organisation and coordination of technical and training activities in the olive sector, in particular in the areas of olive pathogenic diseases, *Xylella fastidiosa* and verticillium wilt, and phytosanitary issues, and for the exchange of knowledge and sharing of information, development of the olive oil value chain and promotion of quality.





NATIONAL TRAINING AND TECHNICAL COOPERATION

Technology transfer and technical cooperation activities at the national level are being organised and will be carried out according to budget availability.



BY THE OBSERVATORY AND IT SYSTEMS DEPARTMENT

At the 105th session of the Council of Members, held in Rome at FAO headquarters in June 2017, the new chart of the Executive Secretariat was approved, officially creating the Observatory and Information Systems Department.

The **Observatory** was created to better share information. It has the following duties:

- Providing a collaborative information platform;
- Coordinating information, data and indicators;
- Setting deadlines for supplying content;
- Compiling the monthly newsletter and OLIVAE

The **Observatory** has become **the new dissemination tool of the IOC**. This ambition came into being via the International Agreement on Olive Oil and Table Olives 2015. The objectives of the Agreement are outlined in article 1 and revolve around three major lines of action. In the context of the “dissemination of information and the olive economy”, the IOC has the responsibility to:



- Enhance its role as a world documentation and information centre on the olive tree and its products;
- Publish economic data and analyses on olive oil and table olives and help members contribute to the smooth running of the olive market;
- Share the results of research and development programmes.





WE HAVE AN OBSERVATORY TO:

- Set up a reliable system to assess the olive sector through relevant, accurate and regular indicators by gathering data from around the world;
- Disseminate the information collected and make it available to decision-makers, researchers, producers, exporters, etc.;
- Collect and analyse information on agricultural value chains;
- Inform public and private decision-makers about new policies and strategies;
- Promote exchange and consultation;
- Help monitor and evaluate reform. This will be achieved by:
 - PROVIDING information on a regular basis, with systematic follow-up on issues relating to the olive sector to promote transparency and raise awareness of scientific progress;
 - CONDUCTING studies and drawing up notifications, forecasts, and explanatory reports on new findings;
 - IDENTIFYING market imbalances and giving recommendations;
 - PROMOTING dialogue and communication in the scientific community, IOC working groups, private sector associations and the Advisory Committee;
 - PROVIDING quality information to aid decision-making and disseminating them interactively;
 - ENCOURAGING dialogue between different segments of the sector and exchange with the different branches of the IOC, where the results obtained, and potential strategies are presented and discussed;
 - CONTRIBUTING to the creation of upstream information, regularly sharing.

WE SHARE INFORMATION THROUGH:

WEBSITE:

The content posted on the IOC website (www.internationaloliveoil.org) covers:



- National and international news
- Member country profiles
- Olive oil and table olive value chains and studies on production costs
- Geographical indications

To give more visibility to IOC activities and be more responsive to the needs of our users, we improved some functions of the website:

- We deleted the 'Work with us' box and expanded the contents to 'Contracts', 'Grants' and 'Vacancies'.
- We added 'Standards' and 'Prices' in the main headers, so users can access this information with just one click.
- We gave more visibility to the activities on the IOC Agenda by putting a box just below the headers.



WE HAVE AN ONLINE SHOP, WHICH HAS SOLD OUR DIGITAL PUBLICATIONS FOR FREE SINCE MAY 2020.

The IOC has a wide range of publications (Olive Oil: Quality of Life; Olive Oil and Health; The Mediterranean Cuisine with Olive Oil; Table Olives in the Mediterranean Cuisine; Notes About Olive Oil; Recipes with Olives) produced by its experts. The best-selling books are: World Olive Encyclopaedia, World Catalogue of Olive Varieties and Following Olive Footprints. Some publications will be available on the online shop in digital format as well as physical.

EVERY MONTH, WE PUBLISH:

- World olive oil and table olive figures
- A list of companies in foreign trade business
- Standards and testing methods, laboratories and quality control programme to preserve the reputation of olive oil and prevent fraud
- Promotion campaigns and target markets
- Nutrition and health news by OHIS



Mediterranean diet	Olive oil	Extra virgin olive oil
EVOO	Gut microbiome	Diabetes
Alzheimer disease	Virgin olive oil	Obesity
PREDIMED-Plus	Phenolic compound	LDL cholesterol
Metabolic syndrome	Oleocanthal	Flavonols
Neurodegenerative disease	Cost saving	Health promotion
HDL cholesterol	Dietary patterns	Breast cancer
RCT	Cytokine	Unhealthy fats
Calories	Cognitive function	Storage
Butter	Alkaline diet	Chronic diseases

PRIVATE AREA

This space belongs to the representatives of IOC member countries. Users are divided into working groups and experts, and they have access to certain documents and permits.

OLIVAE

The official journal of the IOC was created in 1983 and is currently published online in the five official languages: Arabic, English, French, Italian and Spanish. In 2016, the Council of Members decided to dedicate each issue to a member state, allowing readers to delve deeper into the olive sector of a given country. From 2019, the magazine has a new look, new colours, and a more dynamic layout, with the added option to consult texts in the cloud.





MONTHLY NEWSLETTER

The newsletter provides an overview of recent developments in the sector and the activities of the IOC. It presents the latest data on the global olive oil and table olive market. Content on olive oil and health was also added in 2020.



SOCIAL MEDIA

The IOC is active on most popular social media platforms. This service is managed directly by the Translation and Communication Department and is connected to the IOC website.

NEWS

The IOC website dedicates ample space to the activities carried out by the Executive Secretariat at headquarters and in member and non-member countries. Readers can find useful information on current topics and reports on events and initiatives carried out alongside member countries and the world olive oil and table olives supply chain.

OBSERVATORY ACTIVITIES IN 2021

Despite the outbreak of covid-19, the activities of the Observatory and IT System department continued uninterrupted in 2021, as in all 2020.

- All objectives: Olivae, Newsletter; Translation, Advisory Committee activities, Interpretation and Website have been successfully activated and developed.
- We began the construction of the Observatory platform in February 2021. This includes the stabilisation of the private area of the website through continuous action to improve this direct link to the Observatory platform.



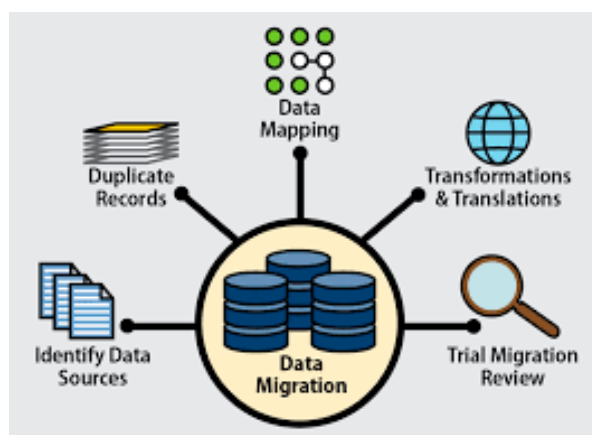
The other major activity delegated to the Observatory is the IT system. In 2020, a new Microsoft 365 email system was installed, and we began a new plan to restore the IT infrastructure of the IOC.

OBSERVATORY ACTIVITIES IN DETAIL

Upgrading the private area

The migration of data from the old private area to the new private area has been delicate, both in terms of adapting to new privacy rules, and in terms of adjusting user access based on who was accredited for each session.

The Observatory Platform will hopefully be activated at the end of 2021, as mentioned above. It will be built through metadata retrieval, insertion, and management. This will help to manage search engines in both the archiving and consultation phases. The development phase is expected to be completed in late 2021 or early 2022.



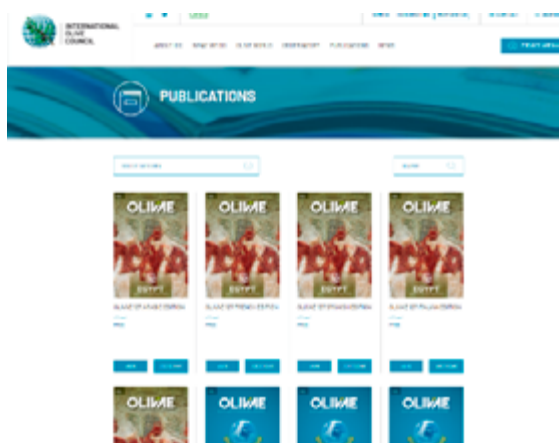
In the meantime, the Department and the Financial Management Unit have also linked online sales to the ERP (the financial management system of the Executive Secretariat) after several inspections.

Following the suggestions of the EU delegation and given the pandemic, the Executive Secretariat has decided to make all digital publications on the IOC website free of charge.

NEWSLETTER

The Observatory is in charge of editing the new IOC newsletter. The new product is offered worldwide and includes a news section on the activities of the IOC operational units, as well as news on legal notices, grants and recruitment. This is followed by economic news with global market updates, brought to readers by the Economics and Promotion Department. This department has also added, in each issue, a country focus, which was much sought after by the international press and statistical experts in the various member countries.

In the first quarter of 2021, the Executive Secretariat published five newsletters. The mailing list has more than 10 000 subscribers and the department has made more than 120 000 email blasts of the newsletter for a total of about 500 pages of news in the editions in English, French and Spanish.



OLIVAE

Issue 127 of OLIVAE was on the Egyptian olive oil sector. It was published on the online library in five languages. Download at this link: <https://www.internationaloliveoil.org/publications/>.

The Department has taken on a new challenge with edition no. 128, which will hopefully be presented at the 114th session of the Council of Members in Georgia.

ADVISORY COMMITTEE

The Observatory Department has managed the activities of the Advisory Committee in close liaison with the Department of External Relations since January 2019. Due to the pandemic, meetings are held virtually. The Department is in charge of the entire administrative management of these events.

PRESS

The Olive News press review (<http://www.scoop.it/t/olive-news>) has 300 400 hits, 68 100 visitors and more than 5 000 subscribers. The Twitter account has 3 800 followers and the LinkedIn page 4 980. These accounts are managed by the Head of the Translation and Communication Department.

NEW MONTHLY IOC DASHBOARD

Since April 2019, the Prices and Budgets Section of the **Economic and Promotion Unit** has launched a new platform with monthly updates of olive sector data. This dashboard includes data on production, consumption and trade in the world's main markets, such as Australia, Brazil, Canada, China, Japan, Greece, Italy, Spain, Russia, the United States and other non-EU import markets.

The table below provides a useful overview of the world olive sector. It will serve as a solid source of global data coordinated by the IOC Observatory and will cover all operational activities of the Executive Secretariat.

This service is already available to the public on the home page of the IOC website. For the time being, click on the olive oil dashboard at the following link:

<https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#prices>



Aur aim is to provide constant, correct and above all authoritative information. All IOC information, especially economic and statistic, comes from official data from the governments of its member countries.

IT SYSTEMS

Overall IT security audit

The IOC has modernised its IT systems in recent years. The Executive Secretariat has recently implemented the following:

- New financial management system (ERP)
- Electronic signature system
- Modernisation and improvement of the website
- Implementation of an electronic time stamping system
- Market research and statistical studies platform (under construction)
- Computerised mail management system (under construction)

Following the IT audit at the end of 2019, a remediation plan was launched in 2020.

The infrastructure redesign report was prepared in the second half of 2020 to ensure more secure infrastructure by reorganising the current services, equipment, wired/wireless and network structure in 2021.

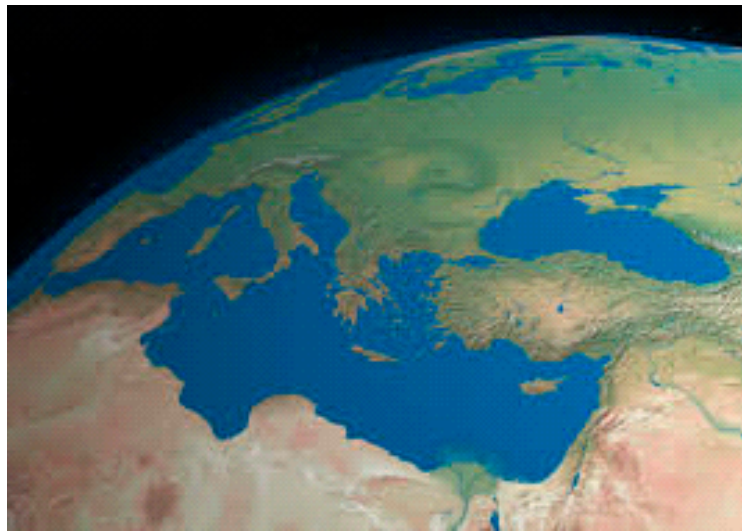


The Department also managed the new tender for IT maintenance. On 23 April 2021, a new agency was recruited to manage this important commitment by applying the cybersecurity measures that were highlighted in the audit.



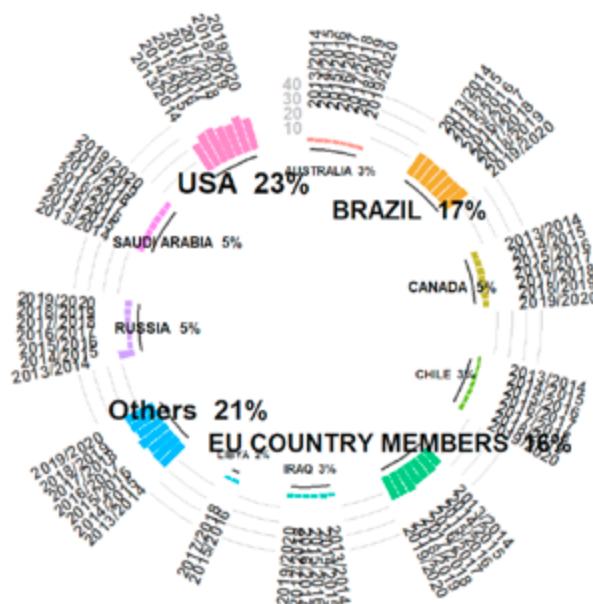
THE WORLD OF OLIVE OIL AND TABLE OLIVES

By Economic and Promotion Unit – Economic Studies and Statistics Department



FOCUS: TABLE OLIVE IMPORTS

The main importers of table olives are the United States (23%) followed by Brazil (17%) and the European Union (16%). Together, these three account for 56% of the world total.



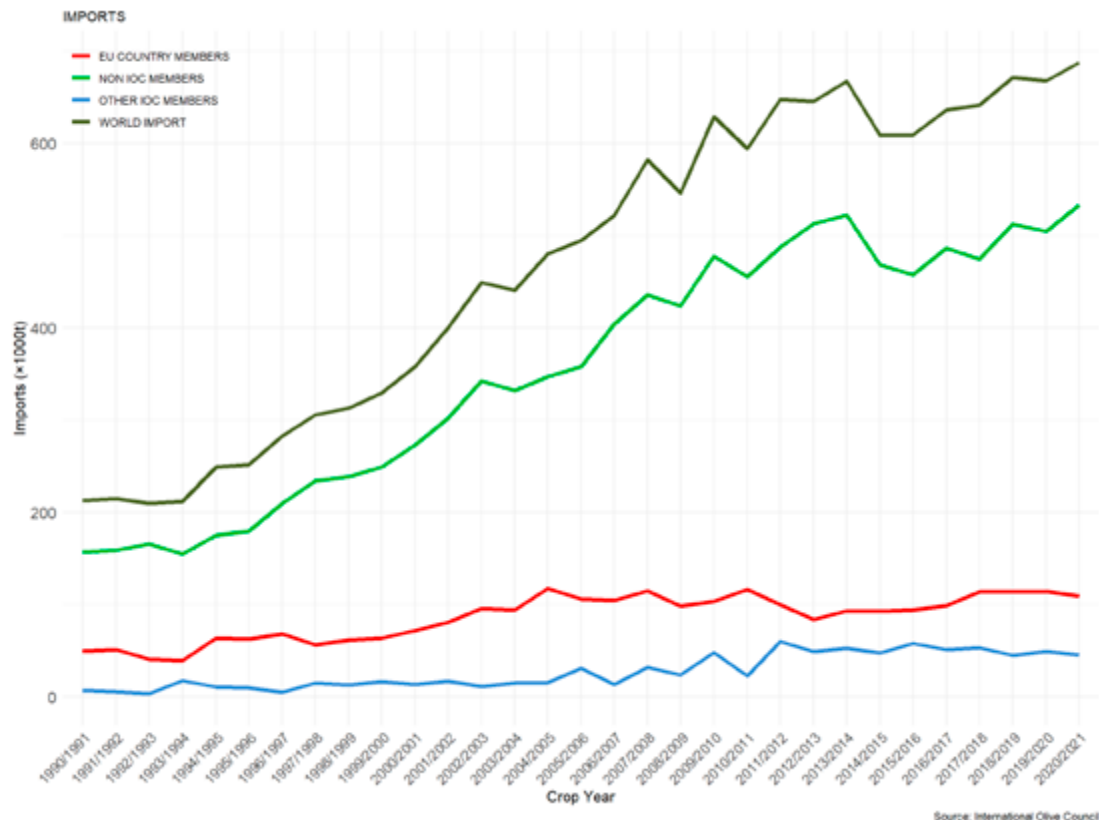
Graph I – Table olives, percentage of world imports (average six crop years)



Table 1 shows how table olive imports have changed over the last seven crop years. In the 2019/20 crop year, imports rose in Brazil (+5.6%), Russia (+2.2%) and Japan (+0.8%) compared to the previous crop year. However, imports plunged in Australia, China and the US at rates of over 10%

	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	Average	%Variation Rates
AUSTRALIA	17914	15841	15510	17597	17260	18488	16330	16991	↓ -11.7
BRAZIL	113999	103255	102045	114284	109933	117796	124371	112241	↑ 5.6
CANADA	29141	29153	29931	28662	31337	32324	32172	30388	↓ -0.5
CHINA	1019	1713	1756	1872	1801	1847	1372	1626	↓ -25.7
JAPAN	4304	4680	3668	4393	3986	4087	4119	4177	↑ 0.8
RUSSIA	26492	22517	21620	24400	25654	28045	28653	25340	↑ 2.2
USA	135453	151939	154050	146232	141211	171620	146444	149564	↓ -14.7
Extra-EU	93018	91526	97455	98777	113948	113960	113699	103198	↓ -0.2
Total	421339	420624	426036	436216	445130	488167	467160	443524	↓ -4.3

Table I – Table olive imports in representative markets (2013/14-2019/20)(t)



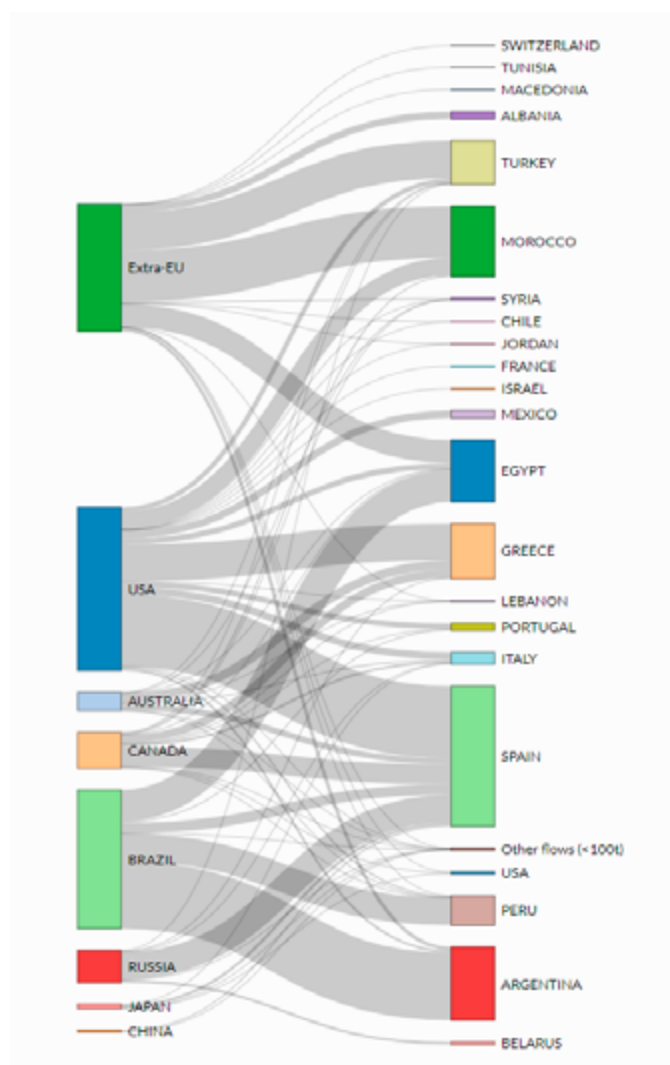
Graph II – Table olives, distribution of world imports (provisional 2019/2020, forecast 2020/2021)



Argentina, Egypt, Greece, Morocco, Peru, Spain and Turkey are the main suppliers of table olives to these markets.

Greece and Spain are the main suppliers to Australia, providing 50% and 34% of all imported table olives respectively. They are also the main suppliers to the US, supplying 44% and 22% respectively. The main suppliers to Brazil are Argentina (49%), Egypt (23%) and Peru (20%). Canada imports table olives from Spain (55%) and Greece (23%). China and Russia import mainly from Spain (91% and 86% respectively). Japan imports from Spain (62%), Italy (17%) and the US (13%). And the European Union imports from Morocco (41%), Turkey (30%) and Egypt (18%).

The volume of table olives that these markets exports ranges from 26 million tonnes from Peru to 145 million tonnes from Spain.



Graph III -Table olive import flows in a few import markets (2019/2020)



I. WORLD TRADE IN OLIVE OIL AND TABLE OLIVES

1. OLIVE OIL – 2020/21 CROP YEAR

The table below shows trade in olive oil and olive pomace oil in eight countries in the first six months of the current crop year (October 2020–March 2021). Imports rose by 25% in Russia; 18% in Canada; 16% in Australia; 12% in the US; and 5% in Brazil compared to the same period the previous crop year. However, imports fell by 14% in Japan and 1% in China.

In the first five months of the 2020/21 crop year, intra-EU acquisitions rose by 3% and extra-EU imports by 18% compared to the same period the previous crop year.¹

OLIVE OIL IMPORTS (INCLUDING OLIVE POMACE OIL)(T)												
Country	OCT 19	OCT 20	NOV 19	NOV 20	DEC 19	DEC 20	JAN 20	JAN 21	FEB 20	FEB 21	MAR 20	MAR 21
Australia	2275.4	3353.3	2471.8	2563.6	2443.6	3377.3	3130.2	1942.9	2375.6	3708.4	2633.4	2840.9
Brazil	8334.3	11052.3	10999.9	12249.6	7845.2	10356.0	8938.4	9219.6	8860.8	7230.1	11911.3	9490.6
Canada	4516.1	5755.7	4001.1	5146.6	4182.1	5900.5	4104.4	5417.4	3222.5	3541.5	5877.1	4686.8
China	3203.8	2588.2	6565.4	5438.5	6586.4	7785.1	3542.4	3452.9	3542.4	1974.5	2780.2	3264.2
Japan	4963.1	4902.6	5298.7	6160.0	7189.2	4478.2	4643.6	3690.9	5125.7	3687.6	6332.9	5915.0
Russia	3411.8	4156.7	2628.9	3908.1	2904.4	3992.3	1593.7	N.D.	2122.7	2764.4	2935.8	2392.6
USA	33224.7	29339.7	22626.7	33389.2	27204.7	32336.5	23870.3	41415.3	29002.5	22794.7	32358.3	29599.8
Extra-EU	13337.0	19817.7	11688.1	22010.5	17869.3	19222.7	14560.8	N.D.	21780.4	17754.0	38069.5	N.D.
Intra-EU	102199.1	98528.6	100322.8	104971.3	115451.0	119103.8	98686.6	N.D.	107469.2	119629.3	112017.9	N.D.
Total	180976.3	179494.7	169448.3	195837.4	194816.3	206552.4	166805.9	65139.0	181285.4	183084.4	211567.8	58189.9

2. TABLE OLIVES – 2020/21 CROP YEAR

The table below shows trade in table olives in the first seven months of the 2020/21 crop year² (September 2020–March 2021). Imports grew by 27% in Australia, 24% in Canada and 17% in Brazil compared to the same period the previous crop year. However, imports fell by 10% in the US.

In the first six months of the 2020/21 crop year, intra-EU acquisitions fell by 13% and extra-EU imports rose by 10% compared to the same period the previous crop year.³



TABLE OLIVE IMPORTS (T)

Country	SEP 19	SEP 20	OCT 19	OCT 20	NOV 19	NOV 20	DEC 19	DEC 20	JAN 20	JAN 21	FEB 20	FEB 21	MAR 20	MAR 21
Australia	1177.7	1590.2	1187.7	1470.6	1606.4	1671.5	1315.2	2141.9	1488.0	1538.6	1164.9	2028.3	1313.1	1353.1
Brazil	9869.7	14702.7	12570.2	17012.7	13466.6	14990.8	11834.1	14363.3	9248.7	9531.1	9559.4	9704.5	9705.8	9113.9
Canada	2310.2	4139.0	2934.7	3671.0	2863.4	4088.8	3192.4	3140.7	2594.0	3072.5	2050.4	2375.5	3172.0	3133.8
USA	14579.7	8942.1	14945.7	11341.4	13593.2	13197.0	11738.4	11828.2	10062.5	11664.8	9311.0	8397.8	12787.5	12571.5
Extra-EU	6993.8	8372.4	8276.1	10867.0	9150.1	10492.1	9325.1	10589.1	9118.0	N.D.	8639.8	7817.1	12933.8	N.D.
Intra-EU	26166.8	29487.6	38698.8	29041.7	31792.5	29070.6	33542.1	24908.9	23754.8	N.D.	25640.3	23213.3	30347.3	N.D.
Total	62000.9	67232.9	80537.5	33495.7	74518.7	73510.8	66565.9	66972.1	58491.0	25807.0	55940.8	53536.5	71395.5	26172.3

¹Data on the EU's imports were not available for March 2021 when this newsletter went to print.

² According to the new provisions of the International Agreement on Olive Oil and Table Olives, 2015, which came into force on 1 January 2017, 'table olive crop year' means the period of twelve months from 1 September of one year to 31 August of the next.

³ Data on the EU's imports were not available for March 2021 when this newsletter went to print.

II. PRODUCER PRICES – OLIVE OILS

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** from 3 to 9 May 2021 stood at €3.37/kg, a 68.5% increase compared to the same period the previous crop year.

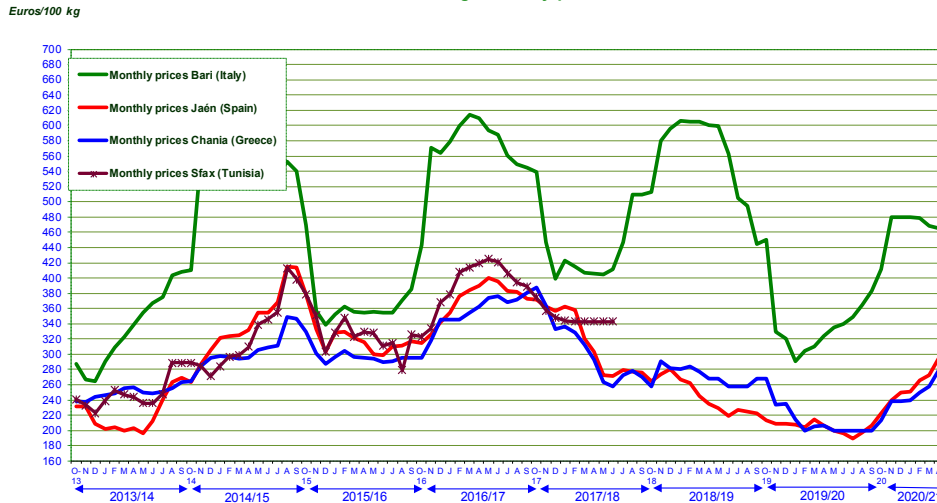
Italy – Prices in Italy from 3 to 9 May 2021 stood at €4.65/kg, a 38.8% increase compared to the same period the previous crop year.

Greece – Prices in Greece from 3 to 9 May 2021 stood at €3.05/kg, a 52.5% increase 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.



**MOVEMENTS IN PRODUCER PRICES
EXTRA VIRGIN OLIVE OIL**
Average monthly prices

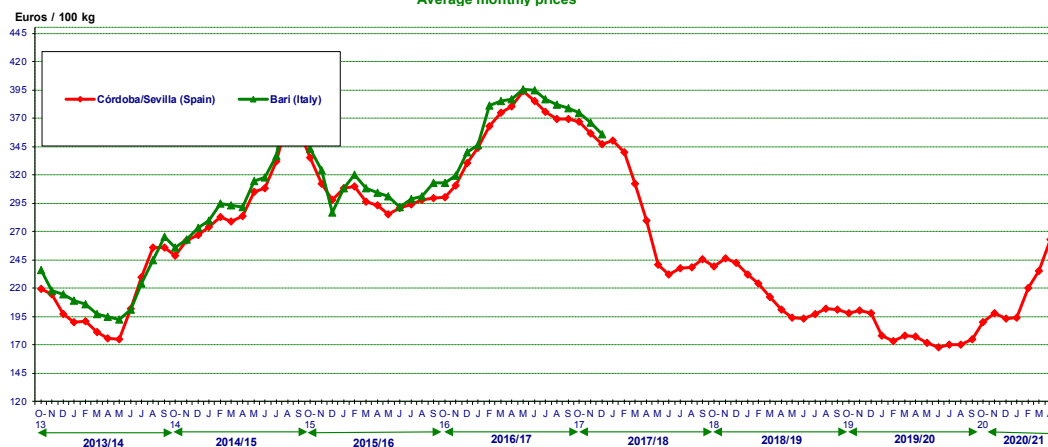


Graph 1

Refined olive oil: Producer prices in Spain stood at €3.01/kg from 3 to 9 May 2021, which indicates an increase of 77% 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.

The difference between the price of extra virgin olive oil (€3.37/kg) and refined olive oil (€3.01/kg) in Spain was €0.36/kg. In Italy, the difference was €0.43/kg in December 2017.

**MOVEMENTS IN PRODUCER PRICES
REFINED OLIVE OIL**
Average monthly prices



Graph 2



STAY TUNED!

<http://www.internationaloliveoil.org>

Keep up with the olive sector through Olive News:

<http://www.scoop.it/t/olive-news>

and the goings on at the IOC:

<http://www.linkedin.com/company/international-olivecouncil>

Our scientific journal Olivæ is available at:

<http://www.internationaloliveoil.org/store/index/48-olivae-publications>



IOC Headquarters:
C/ Príncipe de Vergara 154, Madrid