



IOC EXECUTIVE DIRECTOR MESSAGE



Abdellatif Ghedira

THE IOC TELEWORKING UNTIL 10 APRIL

MADRID – In light of the recent provisions adopted by the Spanish government to prevent the spread of **COVID-19**, the Executive Secretariat informs you that headquarters will be closed until 10 April 2020 inclusive and will continue to serve you and carry out the mandate entrusted to it by the Council of Members remotely through our email addresses and website. All our services are operational with the exception of the receipt of correspondence and postal packages. Calls for tender and contracts whose initial deadline expired before 10 April 2020 have been postponed: the new dates can be found on our website. Thank you for your understanding. We hope that, through the health precautions and efforts we are all taking, we will get through this pandemic and activities will return to normal as soon as possible.

Uzbekistan inquires about IOC membership



Madrid - The current Chair of the IOC, Mr George Svanidze, met with the Minister of Agriculture of the Republic of Uzbekistan in February, who expressed his country's willingness to join the IOC. A few weeks later, the Executive Secretariat received official correspondence from the Uzbek Embassy inquiring about the conditions for becoming a member. Our Legal Department promptly contacted the authorities in Tashkent and sent them all the required documents and conditions.



PROCUREMENT NOTICE

Tender reference: CO/2020 – 11 Obs.

Call for tenders for International Olive Council newsletter implementation services

Description: The purpose of this notice is to procure services for the implementation of the Bulletin of the International Olive Council.

Type of contract: Framework contract with a maximum duration of 4 years

Tendering procedure: RESTRICTED

Date of publication/delivery of the invitation to participate: 17 March 2020

Deadline for applications: 18 April 2020

Address for applications: International Olive Council, Príncipe de Vergara 154, 28002 Madrid

Consignments: This bid does not include consignments

Maximum amount of the tender: **€5 000/year (VAT and other taxes included)**



MARKET
NEWSLETTER
International Olive Council

N° 131
OCTOBER
2018

BRAZIL - IMPORTS OF OLIVE OIL AND TABLE OLIVES

1. OLIVE OIL AND OLIVE-POMACE OIL

■ Brazilian imports of olive oil and olive-pomace oil have risen by 28% over the course of the 2017/18 crop year, reaching 76 816.0 tonnes compared to the previous crop year and surpassing the average volumes of the last four crop years. As regards the provenance of imports, 82% of the total came from European countries: 59% from Portugal, 16% from Spain, 6% from Italy and 1% from Greece. The remaining 18% came from Argentina (10%), Chile (7%) and other countries (1%). Table 1 shows import trends over the last five crop years. It shows how Portugal, the main exporter to Brazil, maintains not only its leading position in this market, in both absolute and relative values, but also strengthens its position compared to the previous crop year. Imports have risen by 5% during the period given in Table 1. Graph 1 shows Brazilian import trends over the last 20 crop years. We can see a continuous increase up until the 2012/13 crop year, before a light fall linked to the economic crisis and the devaluation of the Brazilian currency. Brazilian imports start to pick up in 2015/16 to reach their peak during the last crop year. The monthly movements of this market are shown in Section I.1.

Source	BRAZIL - OLIVE OIL IMPORTS BY SOURCE COUNTRY (INCLUDING ANY OLIVE-POMACE OIL)									
	2013/14		2014/15		2015/16		2016/17		2017/18	
	T	%	T	%	T	%	T	%	T	%
Portugal	42,072.5	59%	42,955.4	60%	29,232.6	37%	34,208.6	53%	45,382.8	59%
Spain	15,678.8	21%	11,754.3	20%	5,871.2	8%	12,265.2	23%	12,382.6	16%
Argentina	6,636.3	9%	5,277.6	8%	5,205.5	7%	5,179.1	7%	7,524.0	10%
Italy	4,338.5	6%	4,067.0	6%	3,274.5	4%	3,000.0	4%	4,252.4	6%
Chile	3,488.9	5%	2,707.0	4%	3,073.2	4%	3,768.0	5%	5,035.5	7%
Others	426.3	1%	346.6	1%	452.4	1%	146.1	0%	494.6	1%
Morocco	81.2	0%	65.2	0%	0	0%	0	0%	0	0%
Yemen	81.2	0%	82.4	0%	0	0%	2.2	0%	0	0%
Malaysia	11.4	0%	25.4	0%	3.55	0%	40.4	0%	55.1	0%
Others	24.0	0%	4.0	0%	1.7	0%	18.3	0%	11.1	0%
Others	0.0	0%	0.8	0%	0.7	0%	18.3	0%	65.5	0%
TOTAL	70,881.9	100.0%	61,778.2	100.0%	50,643.3	100.0%	60,189.9	100.0%	76,816.0	100.0%

Table 1 - Brazil imports of olive oil by country of origin (2013/14-2017/18)

THE ROLE OF TRAINING IN THE QUALITY CONTROL OF VIRGIN OLIVE OILS



Madrid - Sensorial analysis, or tasting, is a crucial step in assessing the quality of virgin olive oil. Panels must be trained and approved by the International Olive Council (IOC) to do so, and they must follow the IOC standard and method. For this reason, taster training is the most sought-after activity the IOC has to offer.

The IOC has held national activities for member countries since 2005. These activities have helped create and improve sensory analysis laboratories in countries all over the world.

Introductory and initiation tasting courses,

practical training in selecting tasters and advanced courses have been organised in countries such as Algeria, Croatia, Cyprus, Egypt, Iran, Israel, Jordan, Lebanon, Libya, Morocco, Montenegro, Poland, Spain, Syria, Tunisia... The aim of these courses is to improve the quality of the olive oils that enter international markets.

The IOC also organises technical assistance training for IOC-approved panel leaders. This helps tasters master the technical tools they need to lead and manage an olive oil tasting panel effectively.



In addition, the IOC awards scholarships for the university specialisation course on the evaluation of virgin olive oil. This course is given in collaboration with the University of Jaén (Spain) and it teaches students the theoretical and practical bases of the organoleptic assessment of olive oils. Students learn how to analyse the factors that influence quality and the positive and negative attributes that define the organoleptic characteristics of an oil. The course demonstrates the relationship between these characteristics and the techniques used in cultivation, production and processing as well as other physico-chemical parameters necessary for quality control.

These grants, national activities and international refresher courses have helped member countries to consolidate knowledge and train panels so that their olive industries can improve the quality of the products they produce and trade. These tools are necessary for quality control, fraud prevention and consumer protection.

These support structures, the sensory analysis laboratories and tasting panels, and their training are not only necessary to monitor and improve quality but also distinguish laboratories and give them a national identity.

The future of olive germplasm

Madrid - The conservation and use of plant genetic resources is key for the future of agriculture, food and the environment. The FAO International Treaty on Plant Genetic Resources for Food and Agriculture, in line with the Convention on Biological Diversity, ensures food security through conservation, free exchange and the fair and equitable sharing of the benefits of these resources. Conservation is carried out at the place where crops are located (*in situ*) and in collections outside their place of origin (*ex situ*). These collections are the Germplasm Banks, which house the legacy of natural and pre-selected diversity of a large number of plant species for food security.



The genetic resources of the olive tree consist of wild varieties of *Olea europaea* L (wild olive trees), other species of the genus *Olea* and varieties cultivated since their domestication some 6 000 years ago. The International Olive Council's network of banks currently includes 23 banks, three of which are international: Cordoba (Spain), Marrakech (Morocco) and Izmir (Turkey). It houses 1 700 entries corresponding to an indefinite number of different varieties. The strategic objectives of the network for the coming years are:



- 1) Establish an agreement with the FAO, the world authority on plant genetic resources, to gradually achieve recognition of the olive tree as a priority species.
- 2) The authentication and sanitation of all entries by means of a common protocol based on the one proposed at the seminar in Cordoba in October 2019.
- 3) To provide authentic and healthy initial material to all the banks in order to certify the plants of the main varieties propagated by the nurseries of each country.
- 4) To publish a catalogue of the main varieties in 2022.

Seminars will be held annually in the countries on the network to verify results and prepare projects to achieve the objectives soon. The next seminars will take place in the other two international banks. The seminar in Marrakech will be held in the second half of 2020. The aim is to consolidate the IOC-FAO network as a global reference for olive genetic resources. Further information will be published soon on this website.

MARIO SOLINAS 2020: THE WINNERS

INTERNATIONAL EXTRA VIRGIN OLIVE OIL COMPETITION 2020 MARIO SOLINAS
QUALITY AWARD INTERNATIONAL OLIVE COUNCIL PRIZE WINNERS AND FINALISTS

MARIO SOLINAS QUALITY AWARD



Madrid - Some 157 samples of extra virgin olive oil were entered into this year's Mario Solinas Quality Award. Hailing from 13 countries from all over the world, the samples were judged by an international panel of eight expert olive oil tasters.

This competition has a bit of history here at the IOC. Named after a noted researcher who made a huge contribution to standardising quality criteria, the award was approved by the Council in 1993 and has taken place every year uninterrupted since the 2000/2001 crop year.



The aim of the competition is to push olive growers, businesses and packagers to produce the best quality extra virgin olive oil, and encourage consumers to recognise the distinct organoleptic characteristics.

Here are the results of the Mario Solinas Quality Award 2020.

[COMMUNICATION MS 2020 EN](#)

[COMUNICADO MS 2020 ESP](#)

[COMMUNIQUÉ MS2020 FR](#)

Workshop for the harmonisation of IOC-recognised tasting panels



The Standardisation and Research Unit will hold an event in 2020 on harmonising tasting panels that have IOC recognition and the Executive Secretariat has invited 90 IOC-certified panel leaders. The organising committee, composed of the international group of panel leaders and experts on organoleptic assessment, met by video-conference to discuss the provisional programme for the event.

Harmonisation ensures good quality results, the proper use of tools, and accurate classification by intensity of positive and negative attributes. The organising committee will draw up the programme for the seminar and prepare the samples and oils, making sure deviations are kept to a minimum and thus harmony and homogeneity is found between the panels.



Meeting of IOC experts on olive oil composition and varietal identification



Madrid - On 25 February 2020, the group of experts for the study on the composition of olive oils and varietal identification was held in Madrid. The Executive Secretariat also invited the coordinators of the IOC working groups for the revision of the Codex standard (fatty acids, ordinary virgin category, median, ethyl esters, PPP & DAGs).

INTERCOMPARISON TESTS FOR LABORATORIES

for the physico-chemical analysis of olive oils and the sensory analysis of virgin olive oils



Several laboratories took part in the most recent intercomparison tests for IOC recognition for the period 1 December 2020 to 30 November 2021.

Every year, the IOC holds tests for laboratories to gain recognition for the physico-chemical analysis of olive oils on the basis of Decision No. DEC-III.2/109-VI/2019.

There are three types of recognition:

- Type A recognition: the basics of quality analysis.
- Type B recognition: advanced purity analyses which also includes quality parameters.
- Type C recognition: the analysis of residues and contaminants.

The IOC holds two tests every year to check how well laboratories conduct the sensory analysis of virgin olive oils in accordance with decision No. DEC-13/103-V/2015. Successful laboratories gain official recognition by the IOC



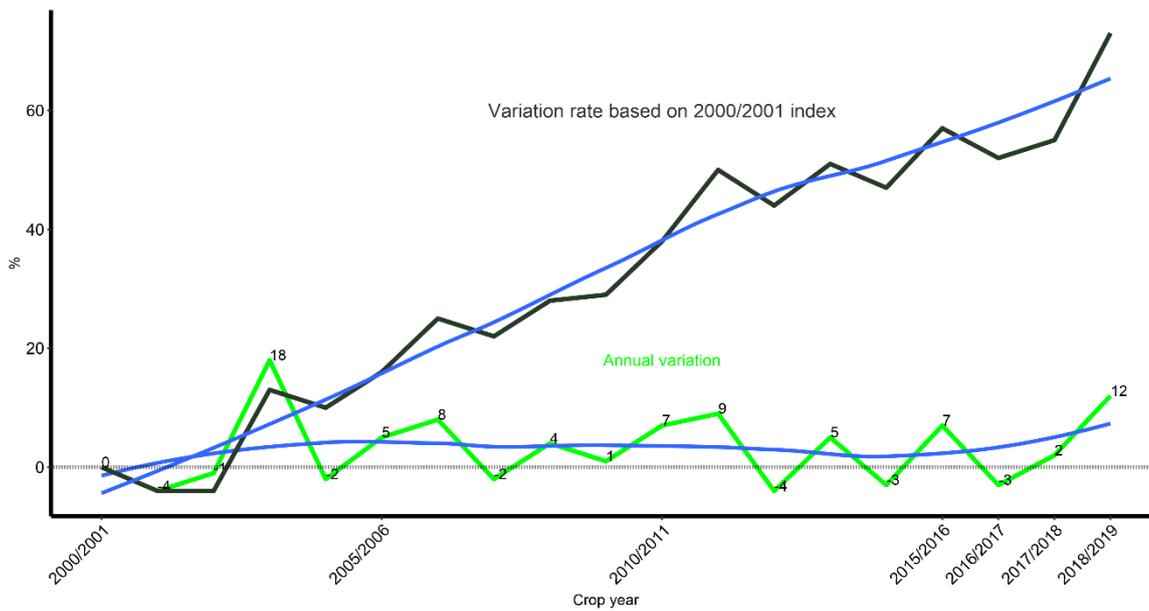
THE INTERNATIONAL MARKET

(Source: Economic and Promotion Unit)

THE UNITED STATES OF AMERICA – IMPORTS OF OLIVE OIL

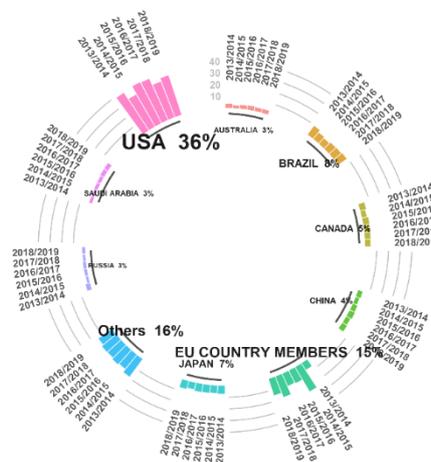
Imports of virgin olive oil and olive oil to the United States broke records in the 2018/19 crop year. Figures reached 346 745 t, a 12% increase on the previous crop year.

1. Olive oil and olive pomace oil



The US is the biggest importer of olive oil in the world, importing about 36% of the global total. The European Union is next, importing 15%, followed by Brazil (8%), Japan (7%) and Canada (5%). The remaining countries account for less than 5% of imports.

Graph I – Olive oil and olive pomace oil, percentage of world imports (average 6 crop years)

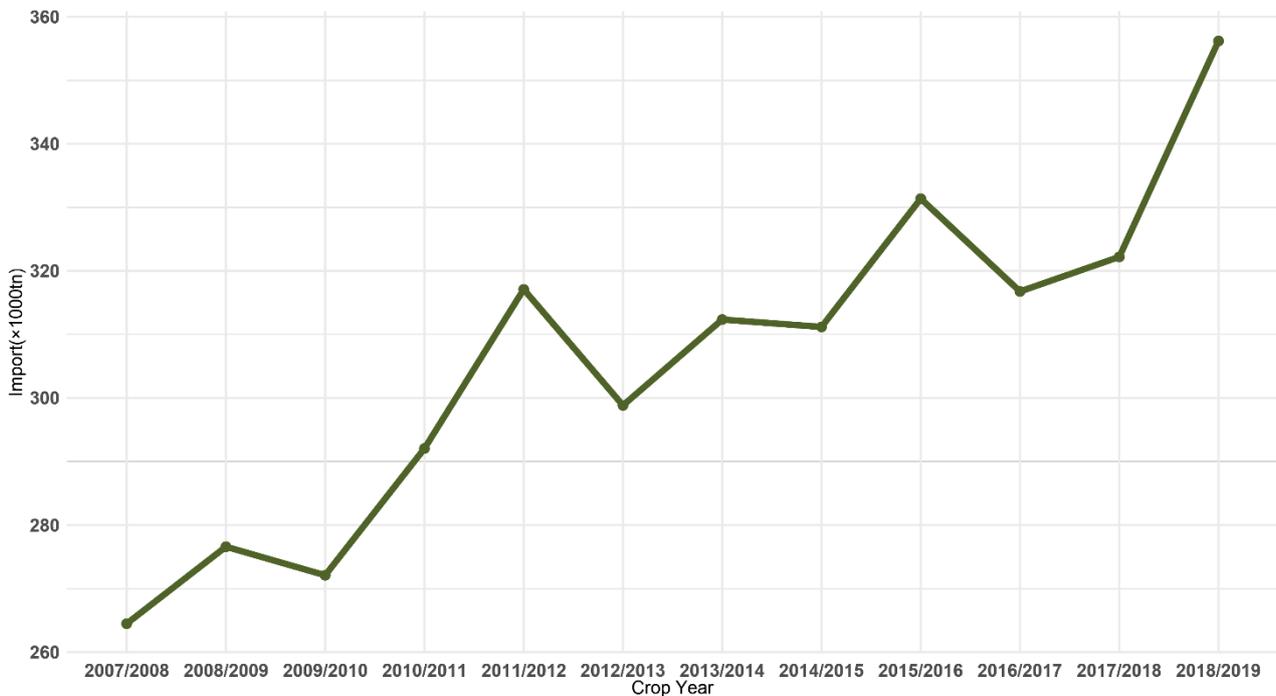




The US imported about 10.5% more olive oil and olive pomace oil in the 2018/19 crop year, reaching 356 183 t. This is an increase of 19.2% compared with the 2012/13 crop year, when it imported 298 827 t. Table I shows imports over the last seven crop years: Spain and Italy are the two main suppliers to the US, accounting for 76.6% of the total. They are followed by Tunisia with 8.4%, and Turkey with 5.8%, but these two saw sharp falls in imports in the 2018/19 crop year of 26.2% and 22% respectively.

	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	%Variation Rates
SPAIN	58950	124464	100843	134443	129766	112739	153386	↑ 36.1
ITALY	145365	137727	127218	129376	117389	106798	112406	↑ 5.3
TUNISIA	35519	15245	45579	26271	15116	40305	29748	↓ -26.2
TURKEY	28729	6701	3544	4014	14681	26635	20768	↓ -22
GREECE	7492	5519	7454	8735	9401	9247	11292	↑ 22.1
MOROCCO	6971	4257	9459	10521	3682	4387	8594	↑ 95.9
CHILE	4092	4507	5144	5401	6986	6997	6132	↓ -12.4
ARGENTINA	5513	8616	6477	7062	12855	8022	5579	↓ -30.5
PORTUGAL	1263	1252	1106	1230	1215	1896	3976	↑ 109.7
LEBANON	1834	1231	1071	1414	1285	1473	1394	↓ -5.4
Others	3100	2822	3278	2903	4384	3701	2908	↓ -21.4
Total	298827	312341	311174	331370	316759	322199	356183	↑ 10.5

Table I – Imports of olive oil and olive pomace oil by country of origin (2012/13 – 2018/19) (t)



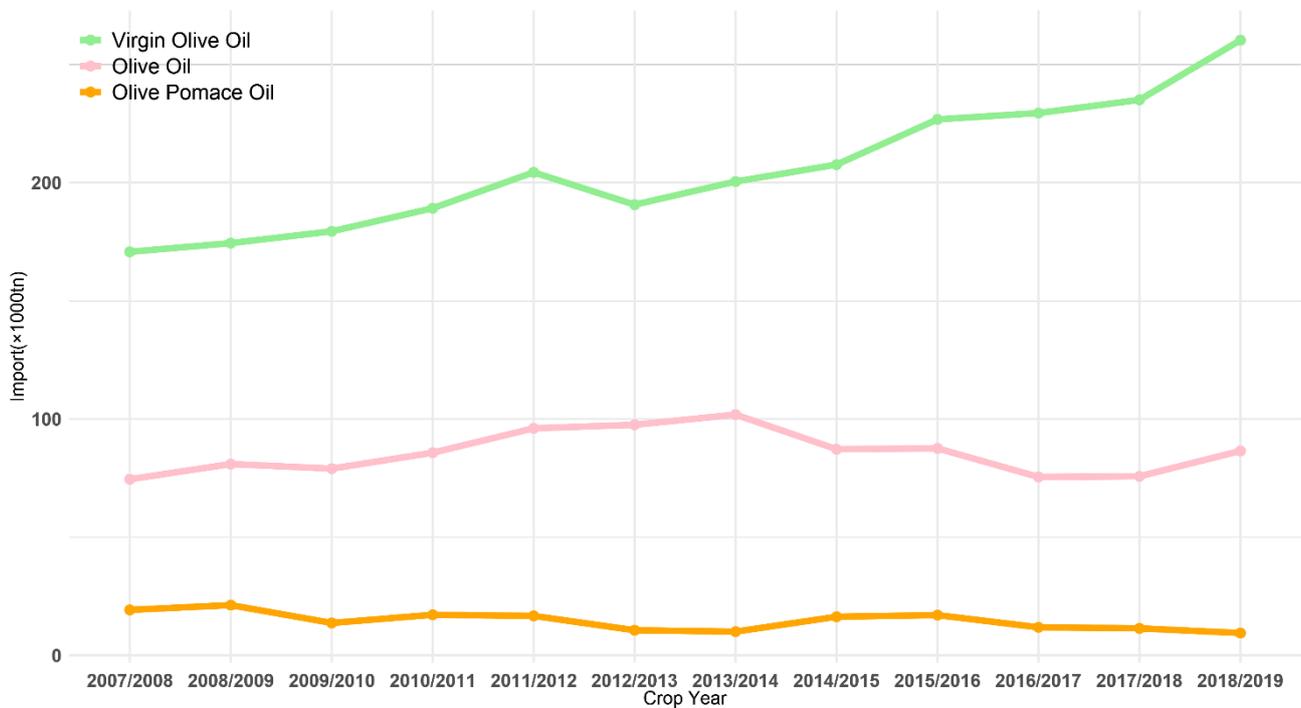
Graph II – Changes in imports 2007/08 – 2018/19 (×1000 t)



In terms of product origin, 78.9% of imports come from the European Union. The remaining 21.1% come from Tunisia (8.4%), Turkey (5.8%), Morocco (2.4%), Chile (1.7%) and Argentina (1.6).

As for volumes per product category, 73.1% of imports fell under code 15.09.10 (virgin olive oil), followed by 24.3% under code 15.09.90 (olive oils) and the remaining 2.6% under code 15.10.00 (olive pomace oil).

There has been a positive trend in imports of virgin olive oils, with volumes increasing by 52.4% if we compare the 2018/19 crop year with the 2007/08 crop year, when 64% of all imports were of virgin olive oils.



Graph III – Imports by product type 2007/08 – 2018/19 (x1000 t)

As for packaging, Italy prefers packaging of under 18kg, while only 4% of their packaging is over 18kg. Other such countries are Greece, Israel, Lebanon and Mexico. However, in Argentina, Australia, Chile, Morocco, the Netherlands, Peru, Tunisia and Turkey, packaging of 18kg or more is used 83% of the time.



Country	OLIVE OIL				OLIVE POMACE OIL		TOTAL BY CONTAINER		TOTAL
	150910 VIRGIN OLIVE OIL		150990 OLIVE OIL		151000 OLIVE POMACE OIL		<18KG	>=18KG	
	<18KG	>=18kg	<18KG	>=18KG	<18KG	>=18KG	<18KG	>=18KG	
SPAIN	54870	51003	19984	22317	1708	3503	76563	76823	153386
ITALY	84829	3401	21207	393	1863	712	107900	4506	112406
TUNISIA	3888	21223	579	4016	0	42	4467	25281	29748
TURKEY	2771	4841	652	11878	40	586	3463	17305	20768
GREECE	8088	2416	624	16	100	47	8812	2480	11292
MOROCCO	591	4180	2	3089	0	732	593	8001	8594
CHILE	437	5695	0	0	0	0	437	5695	6132
ARGENTINA	73	5507	0	0	0	0	73	5507	5579
PORTUGAL	633	2673	655	4	10	0	1299	2677	3976
LEBANON	1334	6	54	0	0	0	1387	6	1394
AUSTRALIA	38	735	39	168	0	0	78	903	981
NETHERLANDS	0	0	0	494	0	0	0	494	494
ISRAEL	311	14	50	84	0	0	361	98	458
MEXICO	169	19	7	4	0	0	176	23	199
PERU	0	192	0	0	0	0	0	192	192
OTHERS	266	56	114	55	9	84	389	195	584
TOTAL	158299	101961	43967	42518	3732	5705	205998	150185	356183

* Source: Own elaboration based on United States Department of Agriculture Foreign Agricultural Service

Table II – Distribution of imports by product type and country (2018/2019) (t)

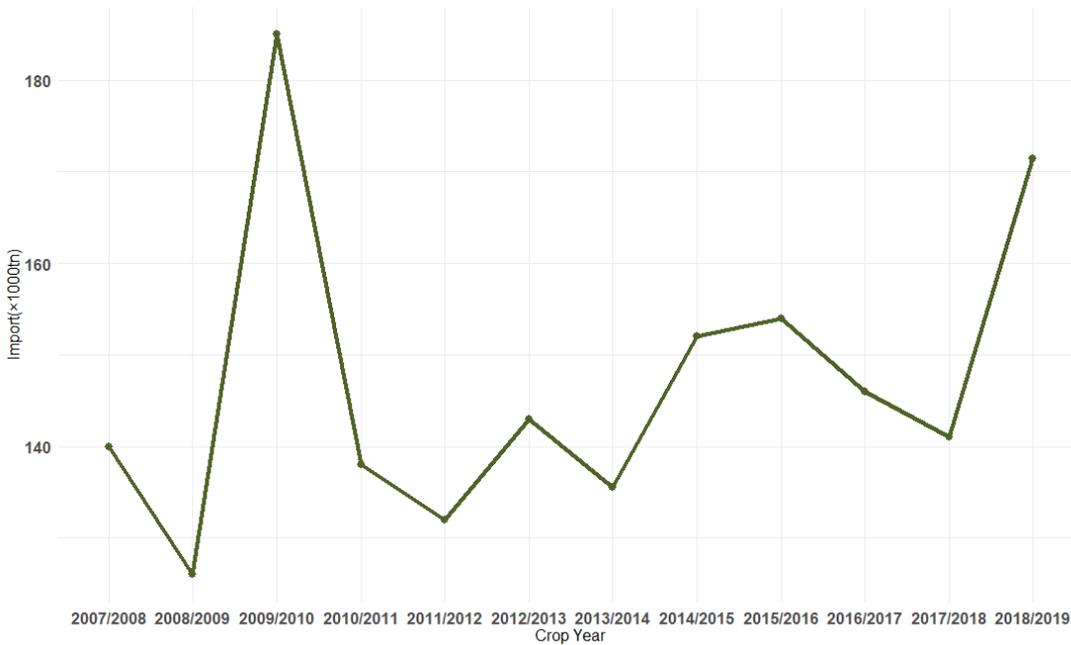




2. Table olives

The US has imported an average of 147 000 t of table olives every crop year for the past 12 crop years, reaching 171 620 t in the 2018/19 crop year (September 2018 – August 2019), or 24.9% of all world imports.

Table II shows imports in the 2018/19 crop year by country of origin. Spain was the main supplier, representing 44.3% of the volume imported (76 010.2 t); followed by Greece with 20.5% (35 177.2 t) and Morocco with 12.7% (21 882.4 t). The remaining countries represent less than 5%.



Graph IV – Imports of table olives 2007/08 – 2018/19 (×1000 t)

	TOTAL
SPAIN	76.010,20
GREECE	35.177,20
MOROCCO	21.882,40
MEXICO	7.759,40
ITALY	6.442,20
PORTUGAL	5.534,90
ARGENTINA	5.526,10
EGYPT	5.342,50
TURKEY	4.432,80
PERU	1.151,00
ISRAEL	823,50
FRANCE	441,10
LEBANON	331,00
CHILE	282,80
JORDAN	184,10
OTHERS	298,80
TOTAL	171.620,00

Table III – Imports of table olives by country of origin





I. WORLD TRADE OF OLIVE OIL AND TABLE OLIVES

1. OLIVE OIL – 2019/20 CROP YEAR

The table below shows trade figures for olive oil and olive pomace oil in the top eight markets in the first three months of the current crop year (October 2019 - December 2019). Imports rose in China (40%); Brazil (18%); Japan (12%); and Russia (2%). Imports fell by 17% in Australia, 10% in the United States, and 2% in Canada compared to the same period the previous crop year.

In the first months of the current crop year (2019/20), intra-EU acquisitions rose by 17% and extra-EU imports fell by 11% compared to the same period the previous crop year¹.

Olive oil imports (including olive-pomace oils) (t)

No	Importing country	October 18	October 19	November 18	November 19	December 18	December 19
1	Australia	3343,7	2275,4	3378,8	2471,8	1894,3	2443,6
2	Brazil	8245,6	8334,3	8467,6	10999,9	6310,5	7845,2
3	Canada	4663,2	4516,1	4028,9	4001,1	4217,5	4182,1
4	China	2495,9	3203,8	4405,4	6565,4	4740,2	6586,4
5	Japan	5142,4	4963,1	5893,7	5298,7	4610,2	7189,2
6	Russia	3058,9	2834,2	2291,4	2628,9	2836,1	2904,4
7	USA	34986,8	33224,7	26394,3	22626,7	30983,4	27204,7
8	Extra-EU/28	12787,9	13189,7	14892,6	11496,3	19103,1	n.d
	Intra-EU/28	89163,6	107857,4	91148,2	103359,5	102335,2	n.d
	Total	163888,0	180398,7	160900,9	169448,3	177030,5	58355,6

2. TABLE OLIVES – 2019/20 CROP YEAR

The table below shows trade in table olives in the first four months of the 2019/20 crop year (September 2019 – December 2019)². It points to an increase of 19% in the United States, 8% in Brazil and 7% in Canada. However, trade fell by 16% in Australia compared to the same period of the previous crop year.

In the first three months of the 2019/20 crop year (September 2019 – November 2019), intra-EU acquisitions rose by 6% and extra-EU imports rose by 1% compared to the same period the previous crop year³.

No	Importing country	September 18	September 19	October 18	October 19	November 18	November 19	December 18	December 19
1	Australia	1598,5	1177,7	1462,9	1187,7	1997,5	1606,4	1232,9	1315,2
2	Brazil	9521,8	9869,7	12056,6	12570,2	12807,1	13466,6	9626,1	11834,1
3	Canada	2702,7	2310,2	2641,3	2934,7	2848,2	2863,4	2403,5	3192,4
4	USA	9902,5	14549,7	11907,0	14945,7	13040,2	13593,2	11242,6	11738,4
5	Extra-EU/28	6523,2	7232,8	8807,6	8514,3	9501,1	9282,0	8713,5	n.d
	Intra-EU/28	29234,7	26860,7	31315,6	40385,0	34606,4	33707,0	29204,6	n.d
	Total	59483,4	62000,9	68191,0	80537,5	74800,5	74518,7	62423,2	28080,1

Table olive import (t)

II. PRODUCER PRICES – OLIVE OILS

¹ EU data were not available for the month of December 2019 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 EU data were not available for the month of December 2019 when this newsletter went to print.



Monthly price movements for extra virgin olive oil and refined olive oil can be found in Graphs 1 and 2.

Extra virgin olive oil - Producer prices in **Spain** in the third week of February 2020 stood at €2.08/kg, a 21% fall compared to the previous crop year (Graph 1).

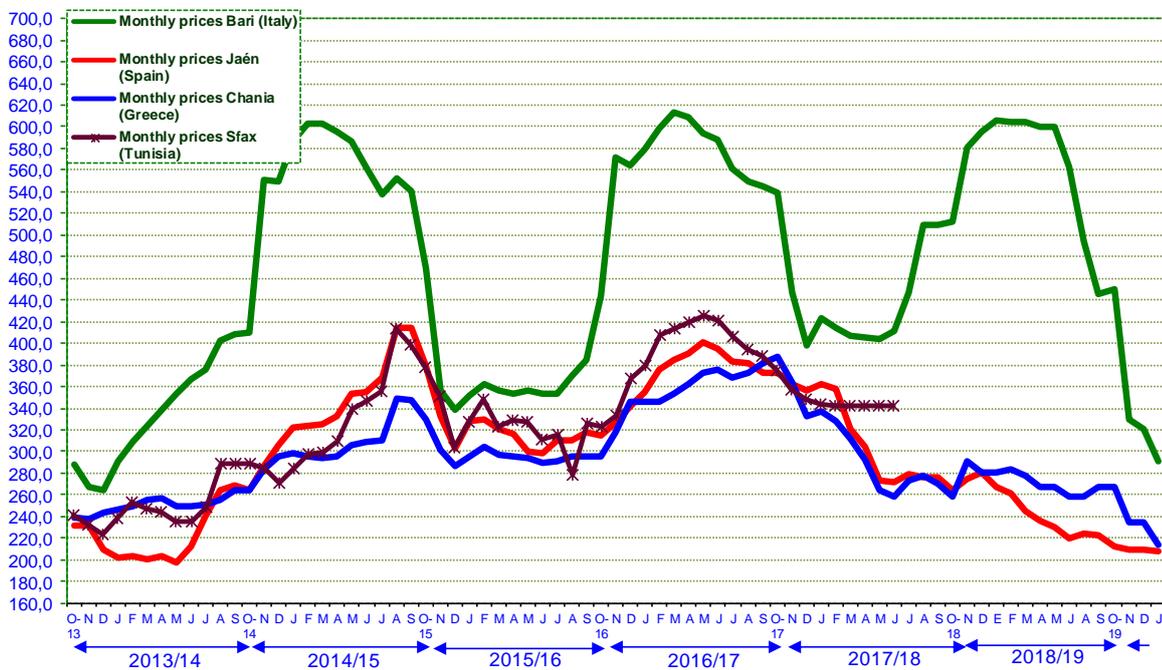
Italy - Prices in Italy in the third week of February 2020 stood at €3.10/kg, a 49% fall compared to the previous crop year.

Greece - Prices in Greece in the third week of February 2020 stood at €1.90/kg, down 33% on the previous crop year.

Tunisia - Prices in Tunisia were stable in the last weeks of June 2018, coming in at €3.43/kg, an 18% fall compared to the previous crop year.

MOVEMENTS IN PRODUCER PRICES EXTRA VIRGIN OLIVE OIL Average monthly prices

Euros/100 kg



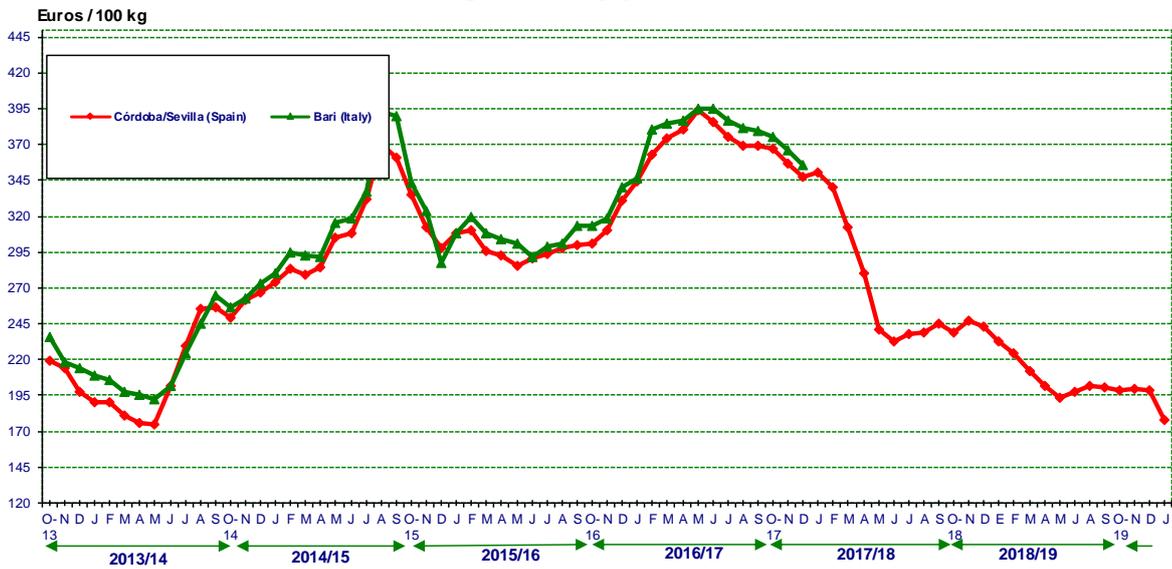
Graph 1

Refined olive oil: Producer prices in Spain stood at €1.75/kg in the third week of February, which indicates a fall of 22% compared to the same period the previous crop year. Data for Italy are not available since the end of December 2017 when they had increased by 4% to €3.56/kg.

In the third week of February 2020, the difference between the price of extra virgin olive oil (€2.08/kg) and refined olive oil (€1.75/kg) in Spain was €0.33/kg. In Italy, the difference was €0.43/kg in December 2017 (Graph 3).



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>



■ The International Olive Oil Council's headquarters
in Calle Principe de Vergara 154 in Madrid