

Madrid, 5 de octubre de 2018

CIRCULAR 141/2018

ASUNTO: Comisión Europea. Situación del Mercado del Aceite de Oliva y de la Aceituna de Mesa (27 de septiembre de 2018).

Muy señores nuestros:

Les adjuntamos la presentación estadística de la Comisión Europea sobre la situación de los mercados del aceite de oliva y de la aceituna de mesa que acaban de colgar en su página web esta mañana.

Este documento será el que presente la Comisión en la reunión del Grupo de Diálogo Civil que tendremos el próximo martes, 9 de octubre, en Bruselas.

Además de la presentación, les adjuntamos el Orden del Día de la reunión, resaltando que en el tercer punto está previsto que se realice una presentación sobre el método de cata. Se presentarán los resultados de los muestreos realizados por la industria en Italia y en España, así como de los análisis jurídicos realizados en ambos países.

Sin otro particular, les saludamos atentamente.



Primitivo Fernández
DIRECTOR.



European
Commission

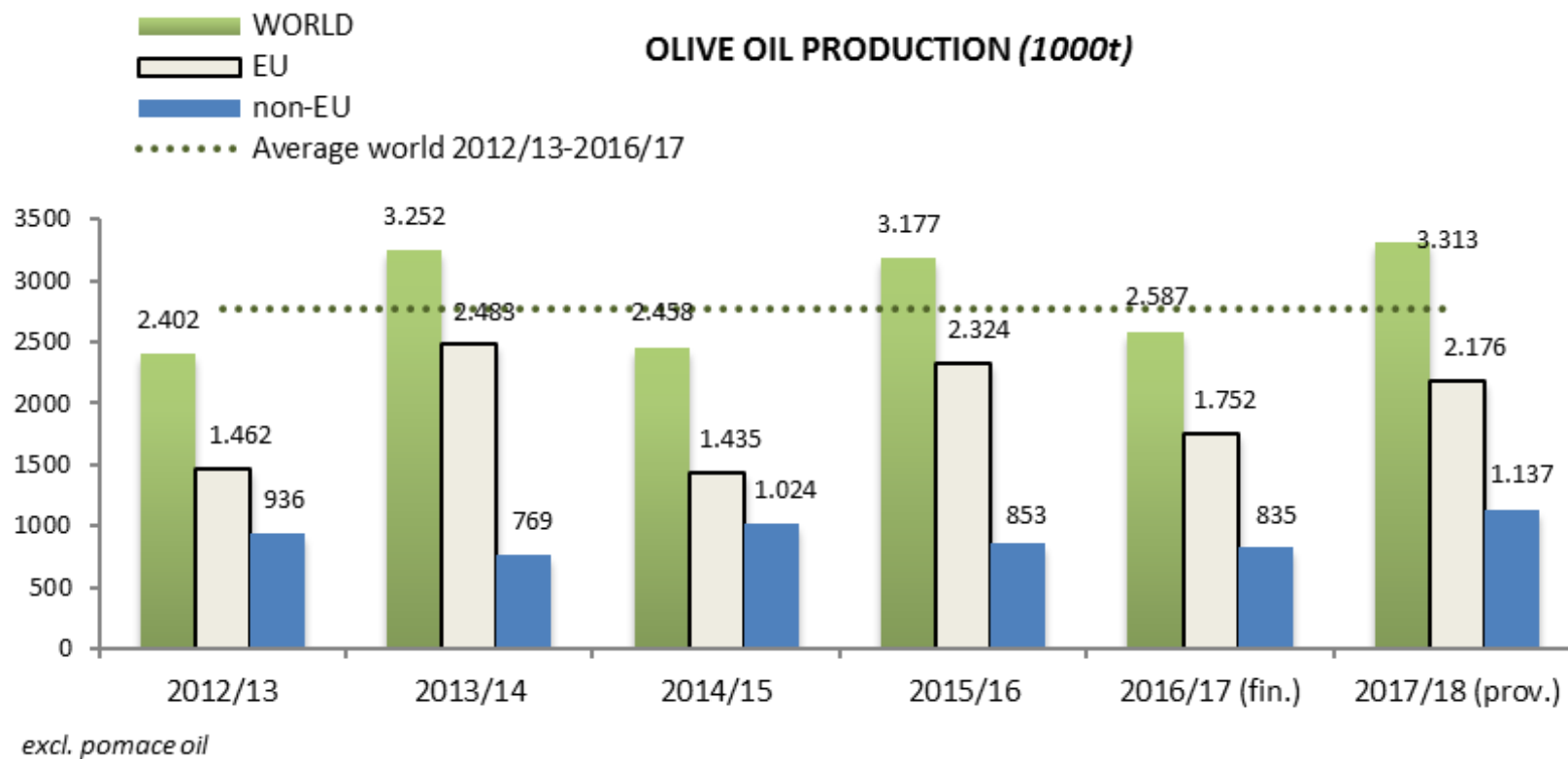
Market situation in the Olive oil and Table olives sectors

*Committee for the Common
Organisation of the Agricultural
Markets – Arable crops and olive oil
27 September 2018*

Lucie Zolichová, AGRI G.4

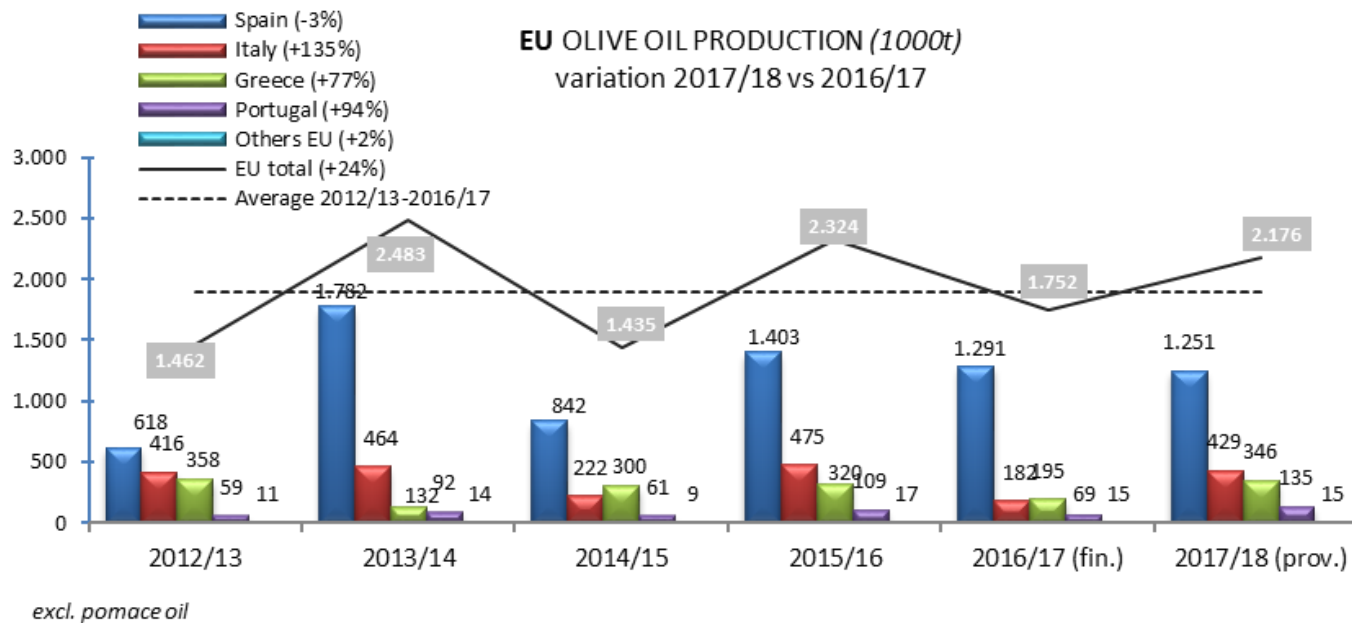
Agriculture
and Rural
Development

OLIVE OIL PRODUCTION, CONSUMPTION & ENDING STOCKS



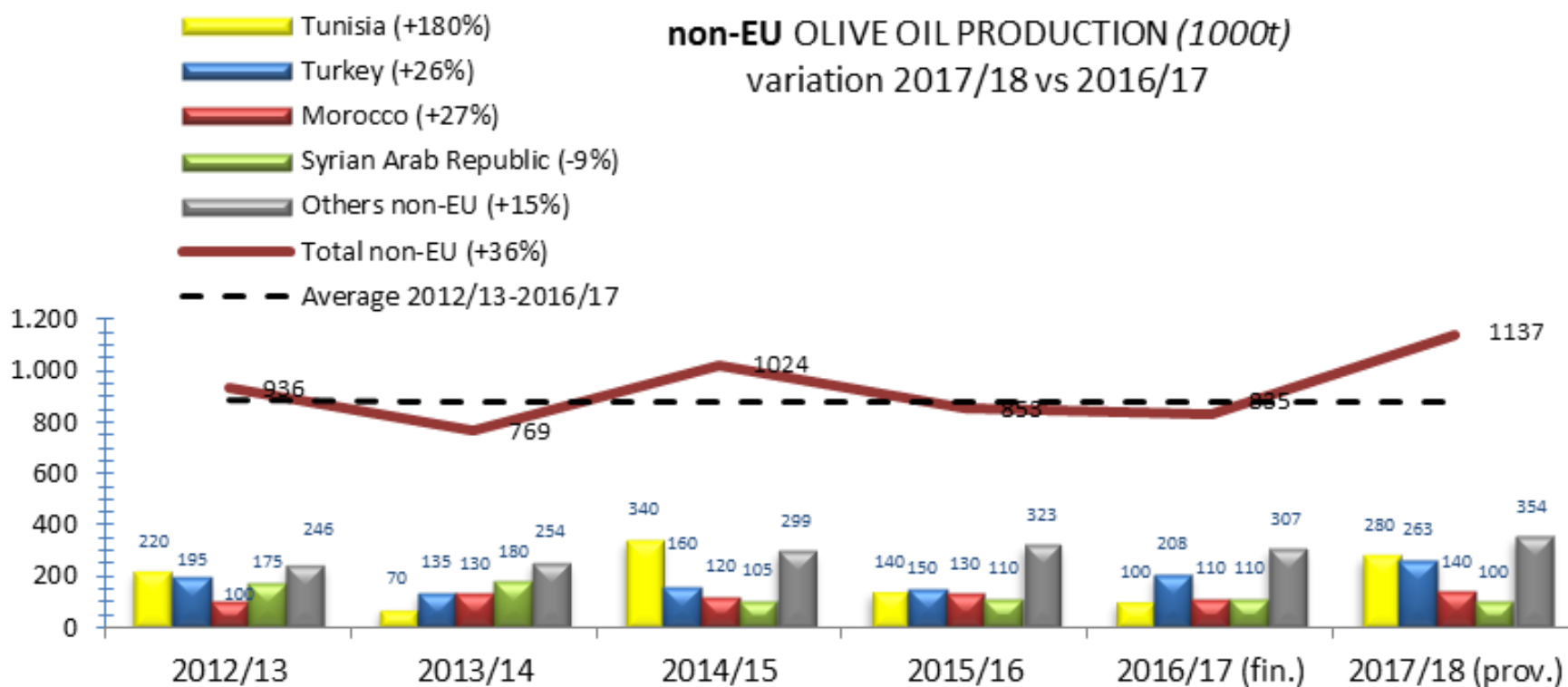
2017/18 vs 2016/17

- **WORLD** +28%
- **EU** +24%
- **non-EU** +36%

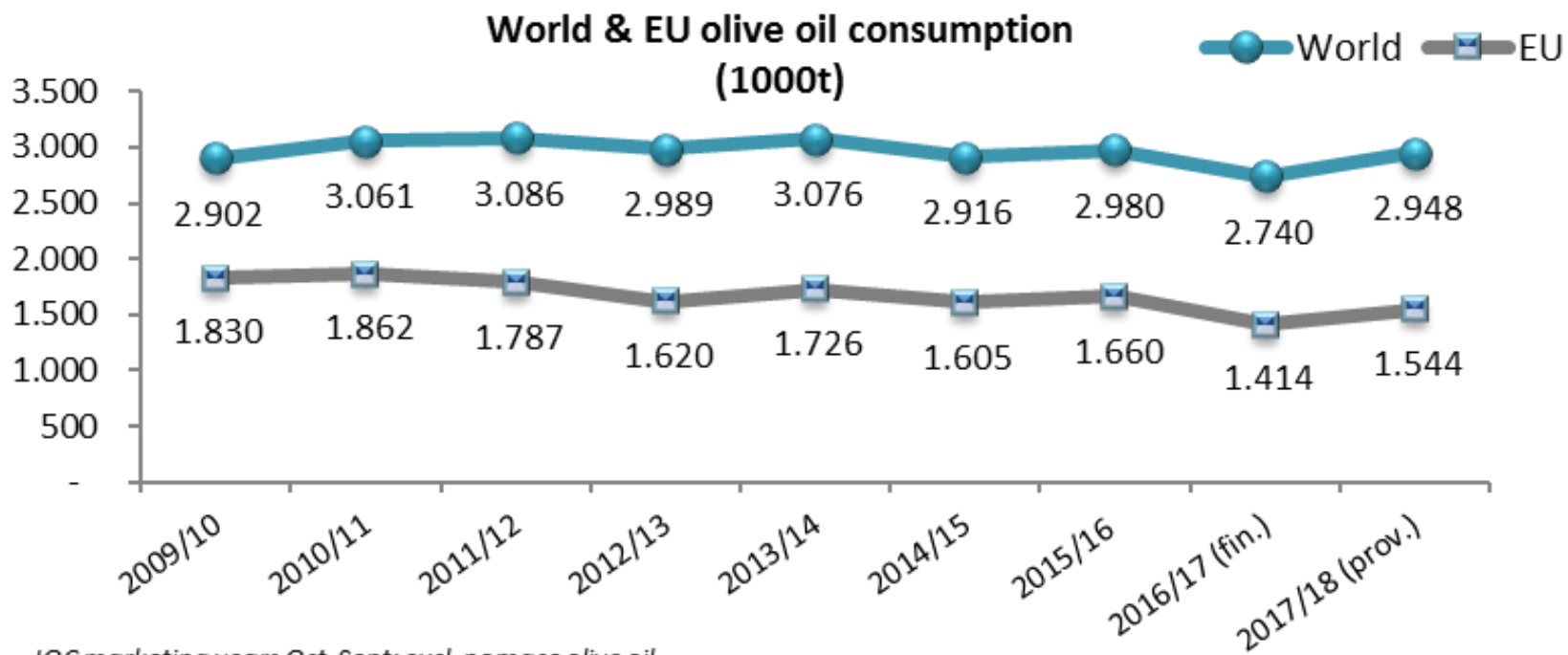


2018/19?

EU production in 2017/18 **15% above** 5-year average

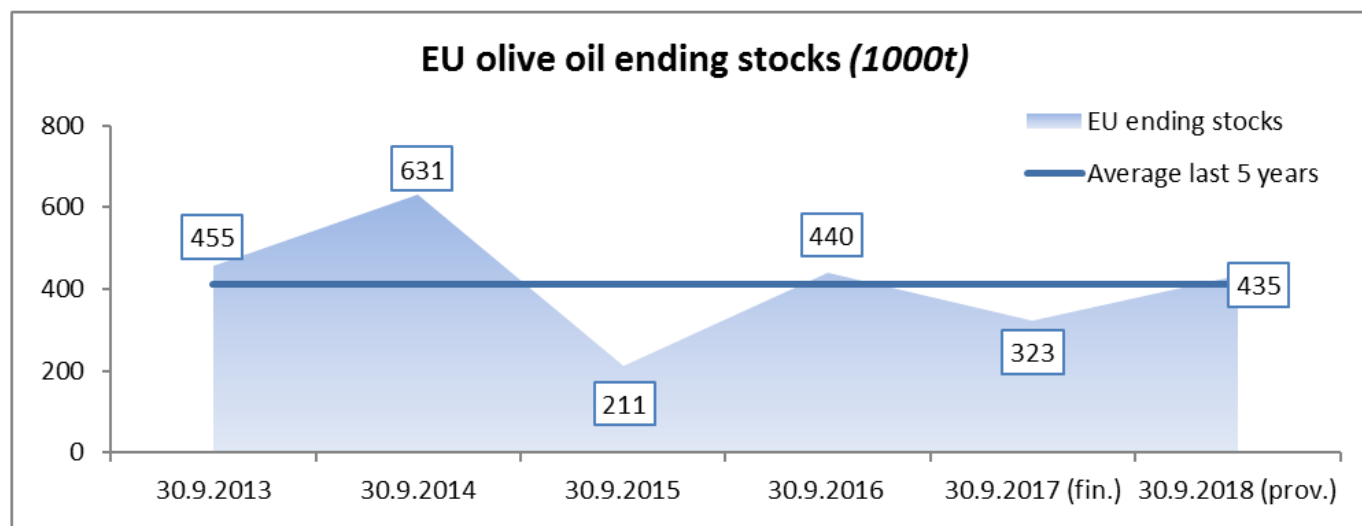
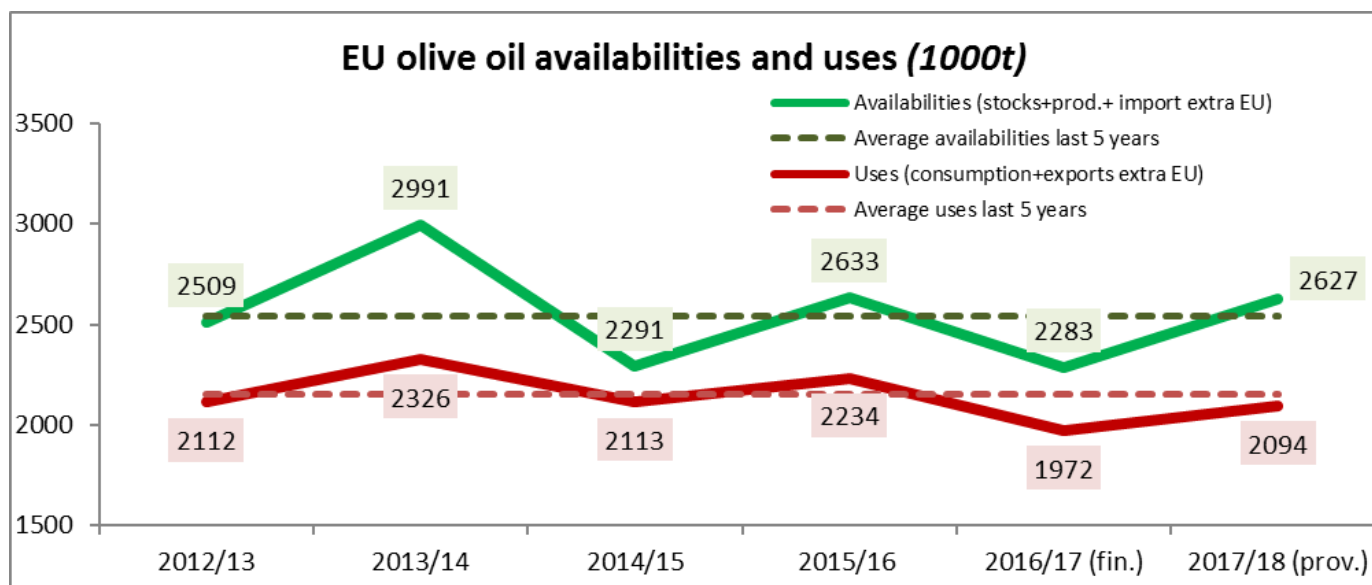


Non-EU production in 2017/18 **29% above** 5-year average



IOC marketing years Oct-Sept; excl. pomace olive oil

2017/18 vs 5-year average:
EU -4%
WORLD 0%



Source: MS declarations, IOC, Eurostat

EU OLIVE OIL EXTRA- TRADE

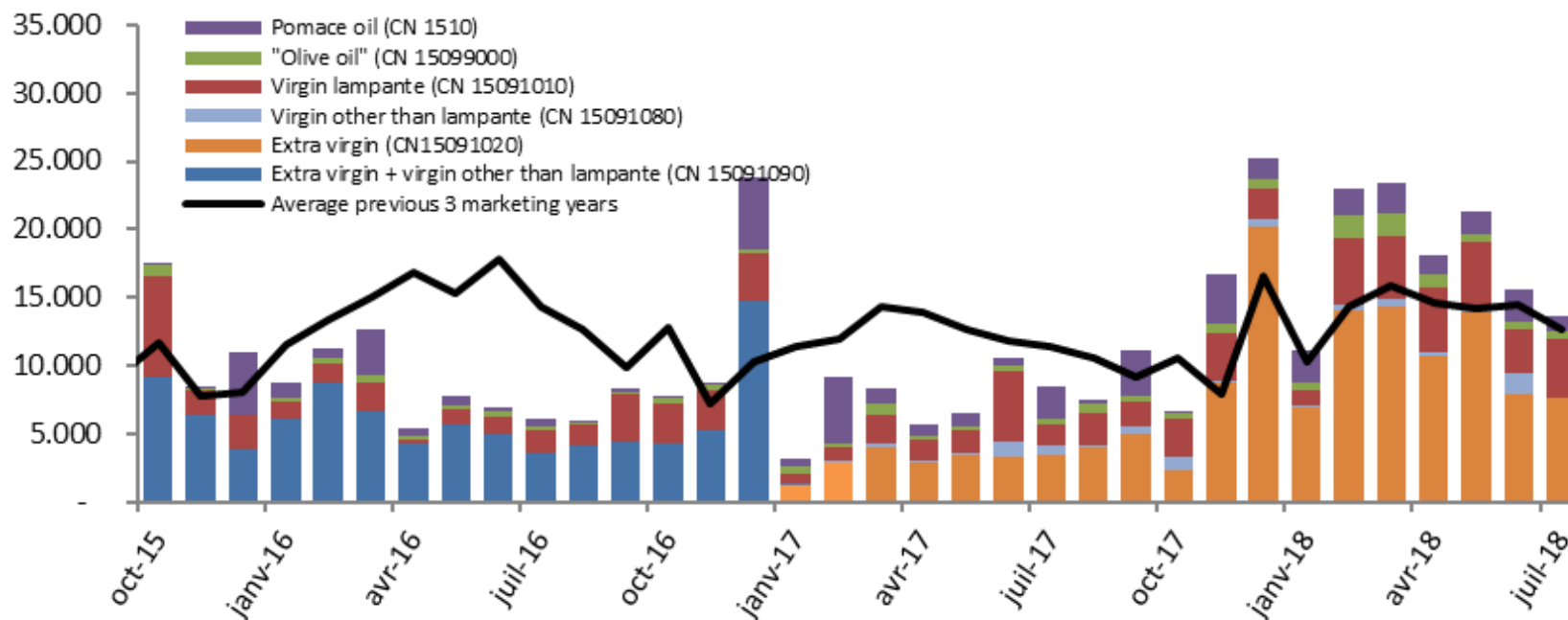
EU imports of olive oil (t)								
ORIGIN	2015/16		2016/17		Oct 17-Jul 18		Oct 16-Jul 17	change Oct 17-Jul 18 vs Oct 16-Jul 17
	tonnes	share	tonnes	share	tonnes	share	tonnes	%
Tunisia	75.988	69%	65.251	59%	113.501	65%	54.994	106%
Morocco	11.513	10%	17.539	16%	15.429	9%	16.440	-6%
Turkey	594	1%	5.781	5%	15.685	9%	4.422	255%
Argentina	9.201	8%	4.742	4%	8.360	5%	1.608	420%
Others	12.867	12%	17.829	16%	21.638	12%	15.057	44%
EXTRA EU	110.163		111.142		174.613		92.522	89%

Source: Eurostat/Comext

Periods October - September

CN codes 1509 & 1510, all stat. regimes

Extra EU olive oil IMPORTS per CATEGORY (t)

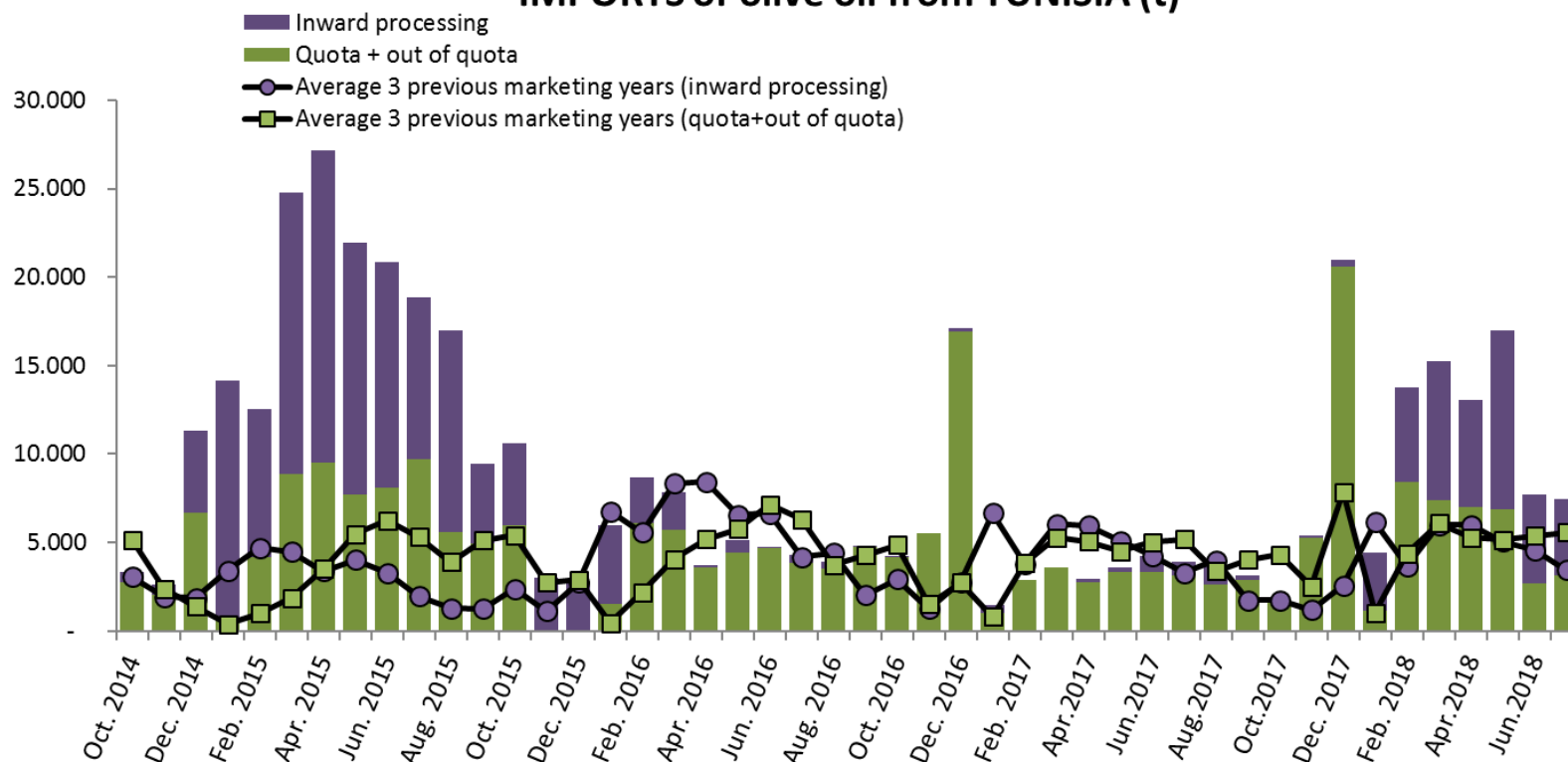


Source: Eurostat/Comext©

Reminder: Change of CN codes as of 1.1.2017: 15091090 becomes

- 15091020 (extra virgin)
- 15091080 (virgin other than lampante)

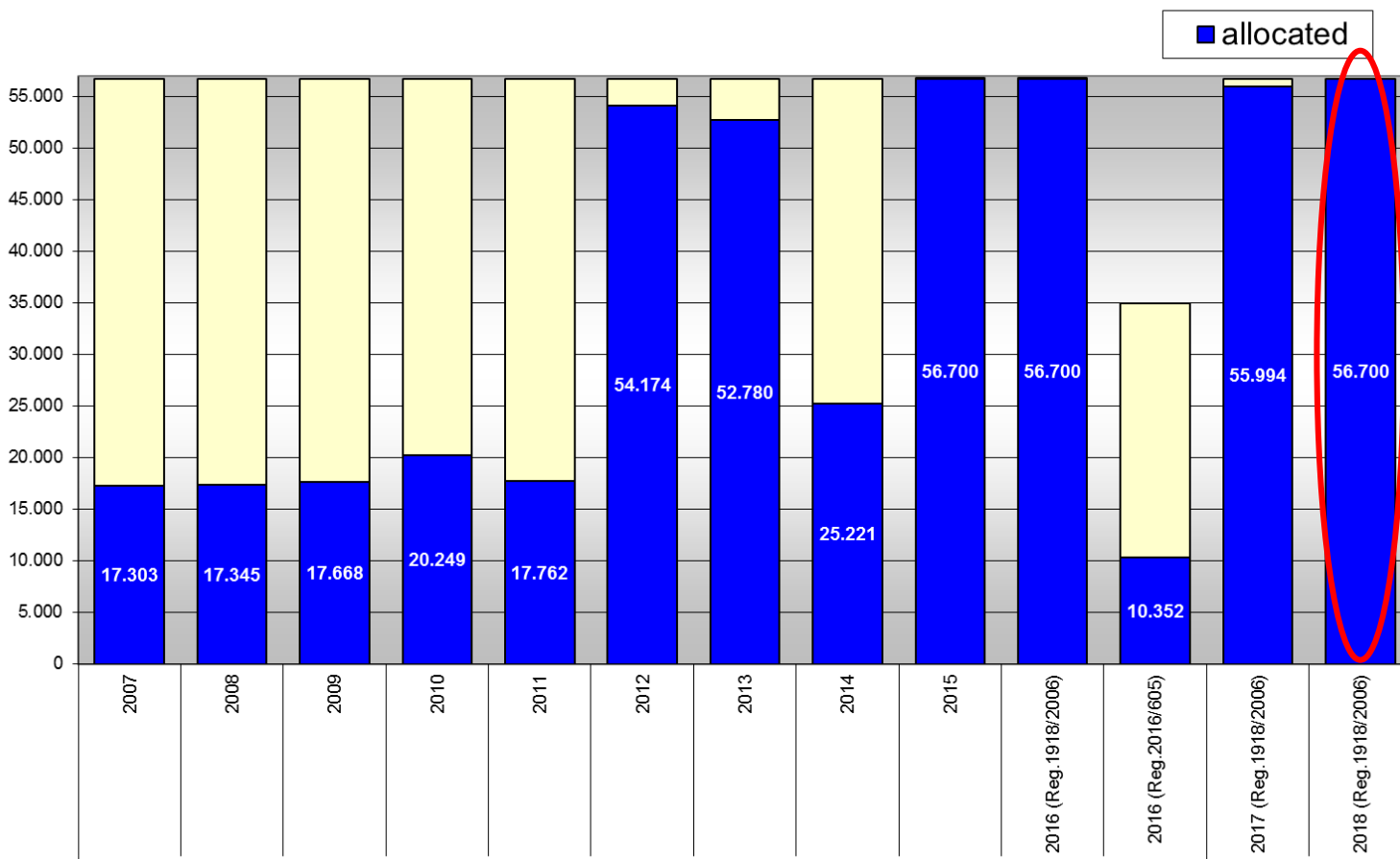
IMPORTS of olive oil from TUNISIA (t)



Source: Eurostat/Comext©; CN 150910

Inward processing (IP) – a relief from customs duty and import VAT on goods that are imported from outside the EU to be processed, and then exported outside the EU or released for free circulation in the EU. Excise duty is also suspended when goods are entered into IP.

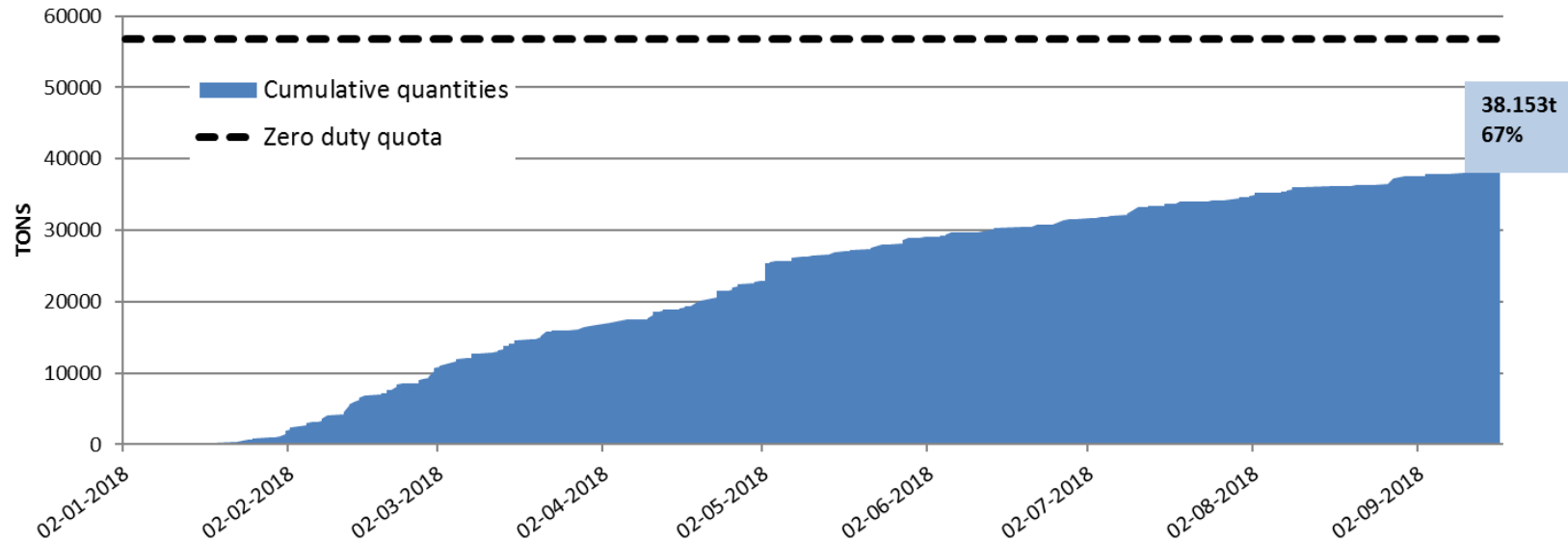
TUNISIA - OLIVE OIL ZERO DUTY IMPORT QUOTA
Quota use: allocated part* of total available quantities (t)



* re-allocated quantities (following re-distribution of unused quantities) are not taken into account to avoid double counting
Source: DG AGRI/G.1; June 2018

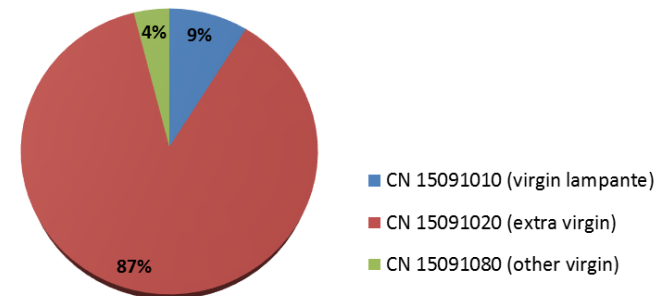
99%

EU olive oil imports from Tunisia under zero duty quota



Source: DG Taxud Surveillance, data until 17.9.2018

EU olive oil imports from Tunisia under zero duty quota - import share per category

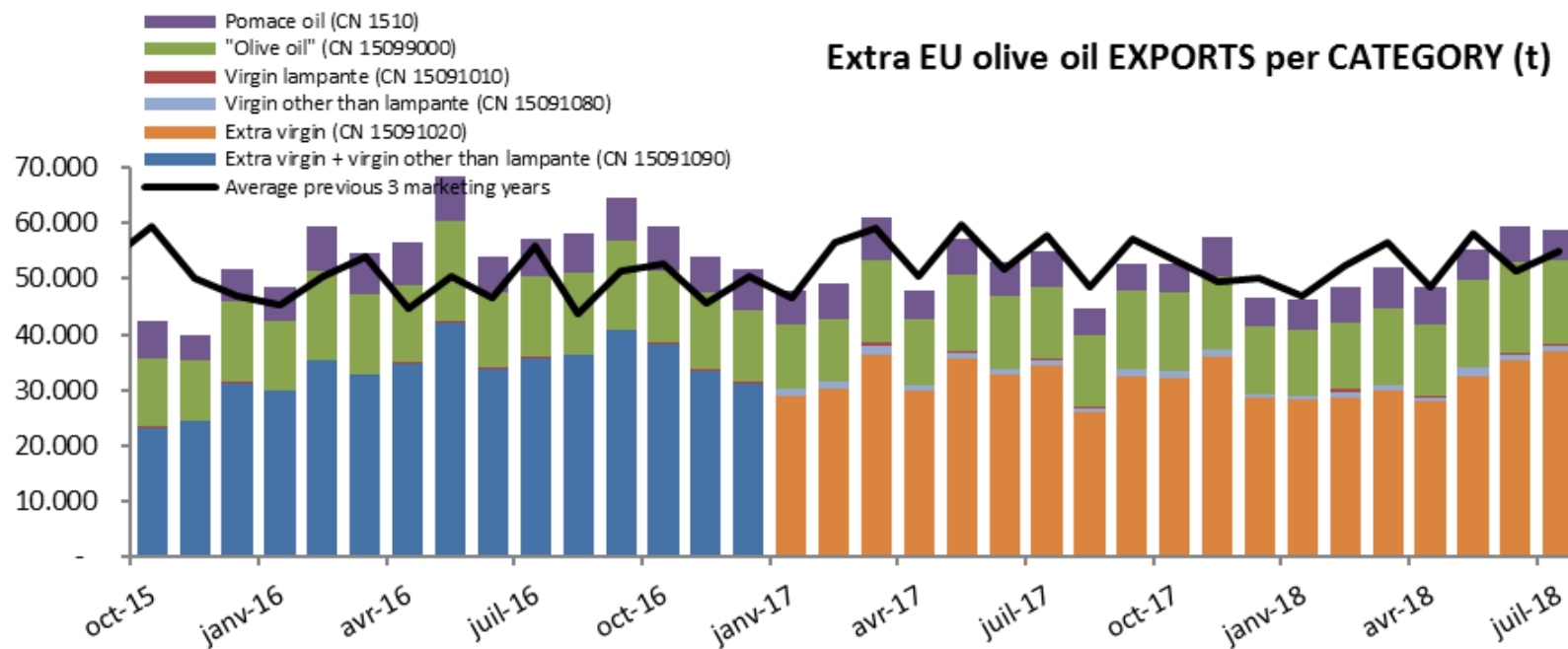


EU exports of olive oil (t)								
DESTINATION	2015/16		2016/17		Oct 17-Jul 18		Oct 16-Jul 17	change Oct 17-Jul 18 vs Oct 16-Jul 17
	tonnes	share	tonnes	share	tonnes	share	tonnes	
USA	248.018	38%	236.944	37%	169.398	32%	201.076	-16%
Brazil	46.212	7%	45.964	7%	54.878	10%	37.525	46%
Japan	53.708	8%	51.940	8%	42.503	8%	44.476	-4%
China	43.955	7%	38.815	6%	32.062	6%	32.722	-2%
Canada	29.266	4%	27.828	4%	25.495	5%	22.720	12%
Australia	26.288	4%	26.907	4%	24.542	5%	22.839	7%
Russia	16.581	3%	16.613	3%	14.111	3%	14.195	-1%
Others	191.142	29%	188.926	30%	162.877	31%	160.704	1%
EXTRA EU	655.170		633.938		525.865		536.257	-2%

Source: Eurostat/Comext

Periods October - September

CN codes 1509 & 1510, all stat. regimes

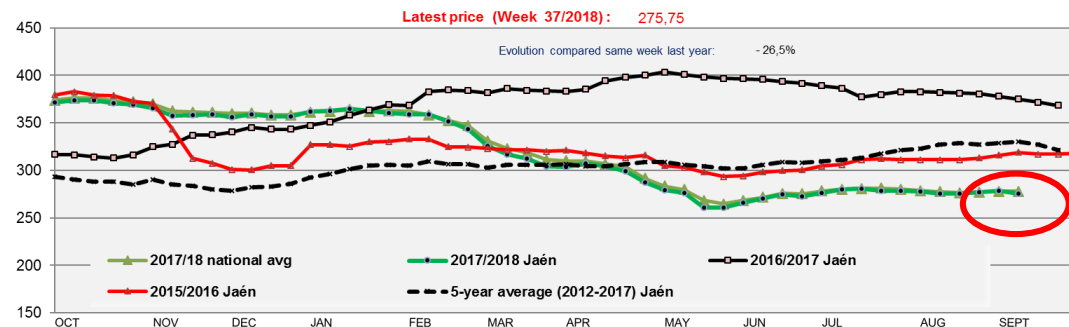


Source: Eurostat/Comext©

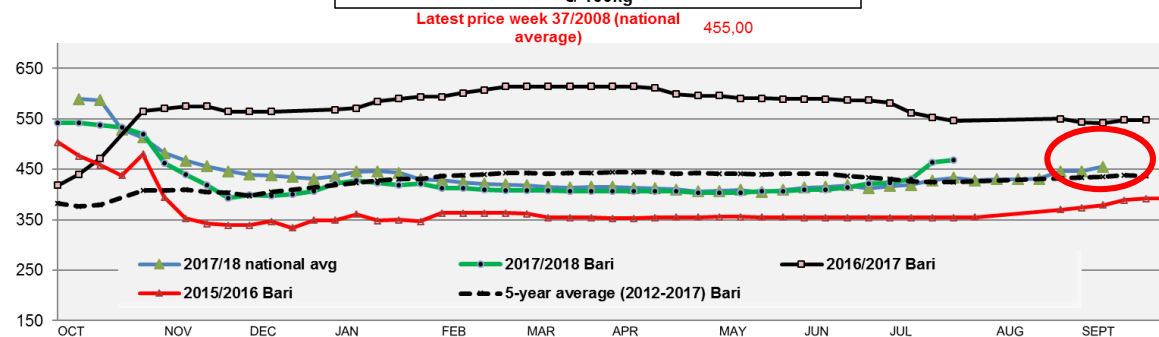
EU OLIVE OIL PRICES

(until 16.9.2018)

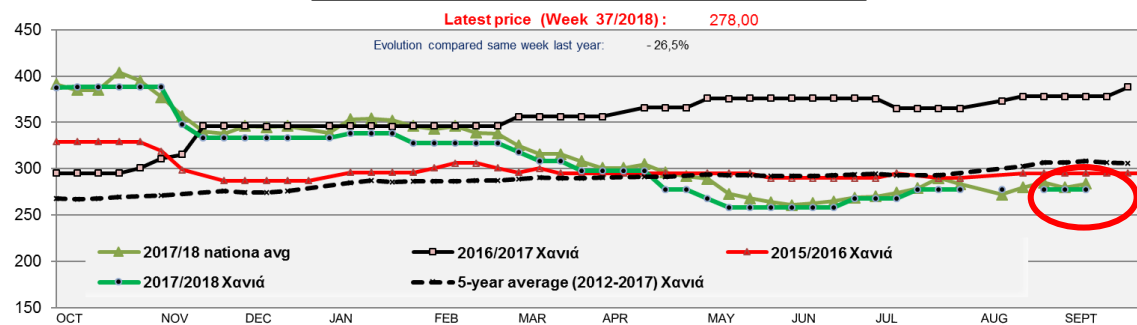
Evolution of EXTRA VIRGIN olive oil price - SPAIN €/ 100kg



Evolution of EXTRA VIRGIN olive oil price - ITALY €/ 100kg



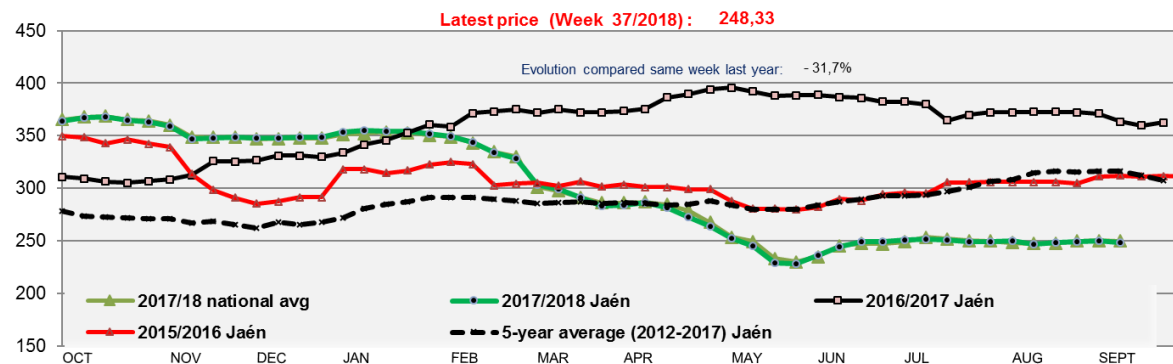
Evolution of EXTRA VIRGIN olive oil price - GREECE €/ 100kg



VIRGIN CATEGORY

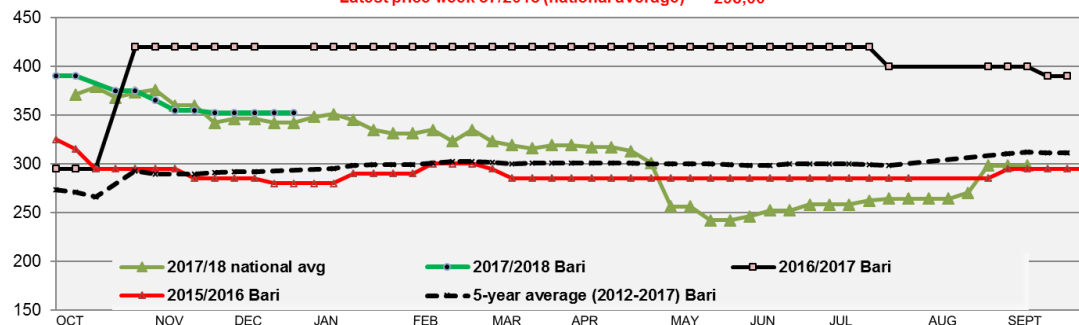


Evolution of VIRGIN olive oil price - SPAIN €/ 100kg



Evolution of VIRGIN olive oil price - ITALY €/ 100kg

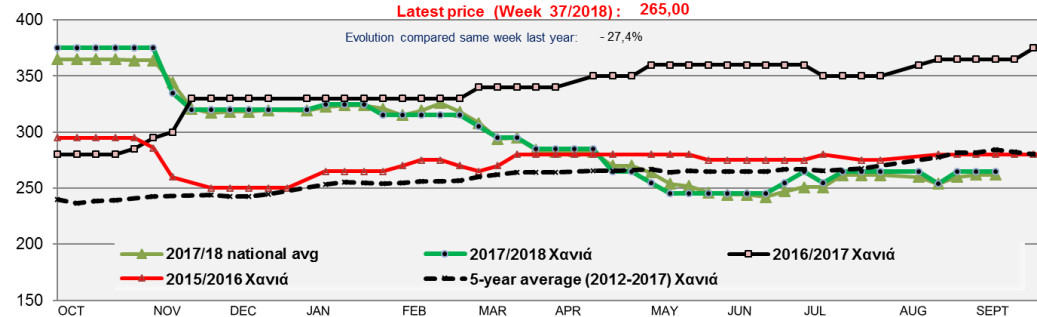
Latest price week 37/2018 (national average) 298,00



Evolution of VIRGIN olive oil price - GREECE €/ 100kg

Latest price (Week 37/2018): 265,00

Evolution compared same week last year: -27,4%





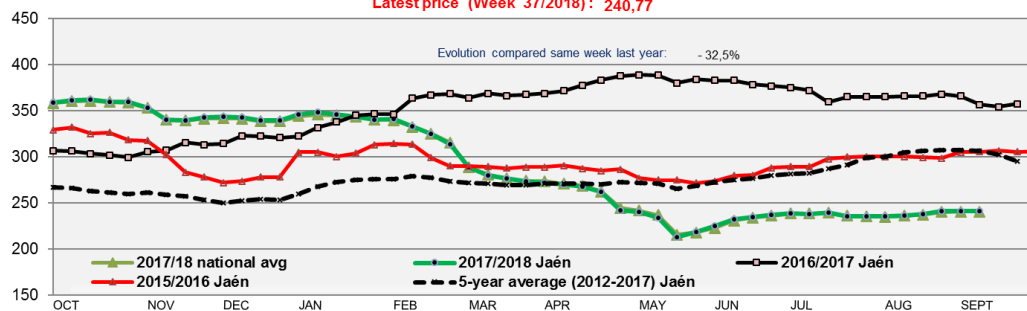
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LAMPANTE CATEGORY

Evolution of LAMPANTE olive oil price - SPAIN

€/ 100kg

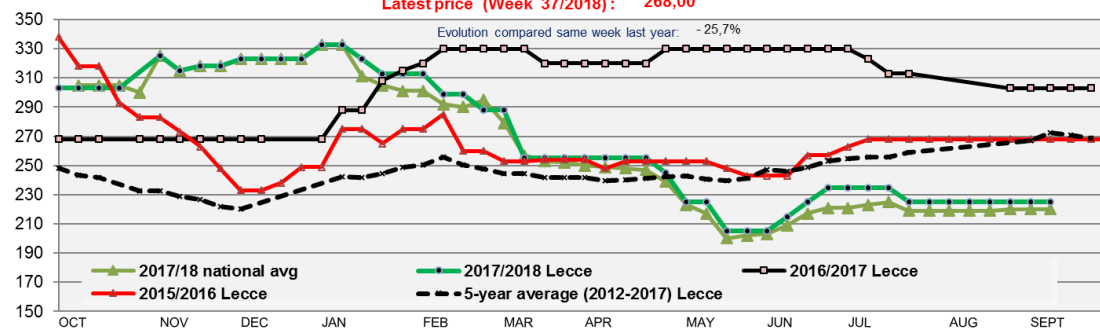
Latest price (Week 37/2018): 240,77



Evolution of LAMPANTE olive oil price - ITALY

€/ 100kg

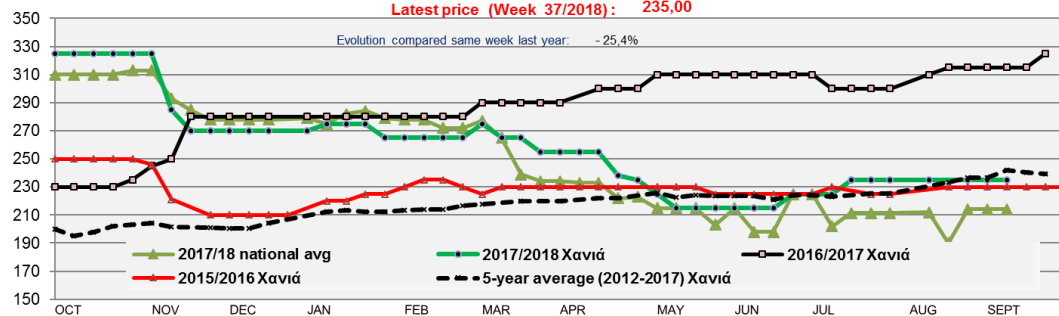
Latest price (Week 37/2018): 268,00



Evolution of LAMPANTE olive oil price - GREECE

€/ 100kg

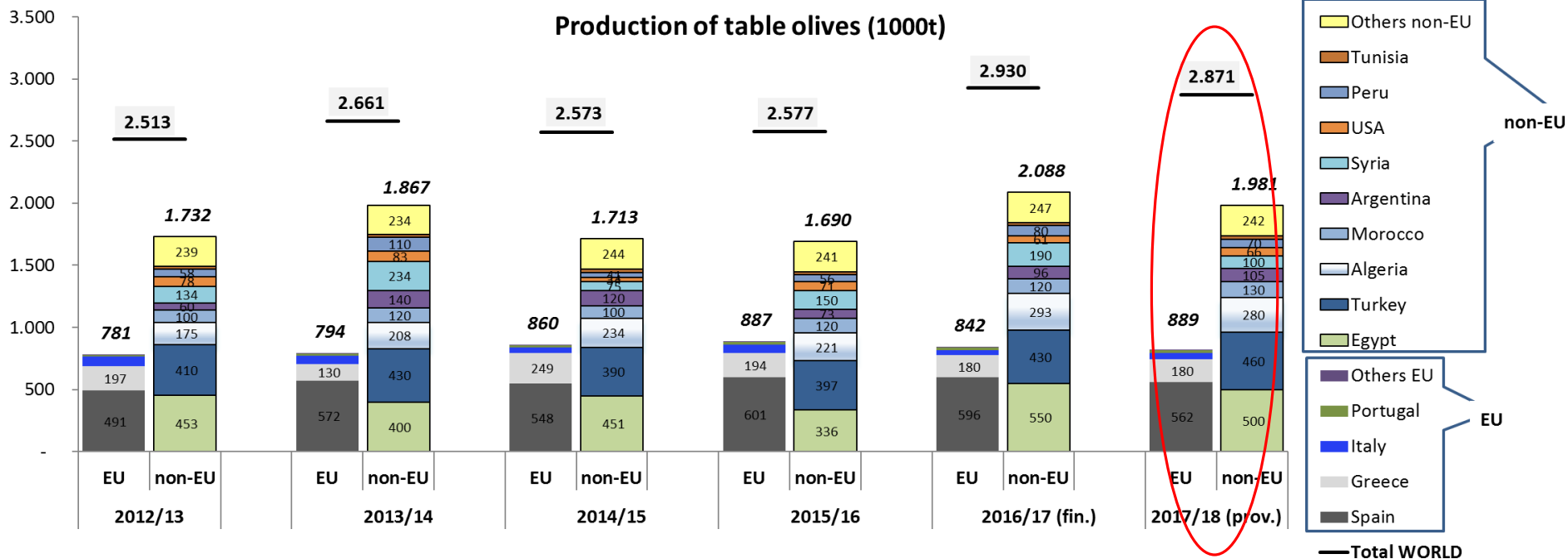
Latest price (Week 37/2018): 235,00



Source: MS declarations (R1185/2017)

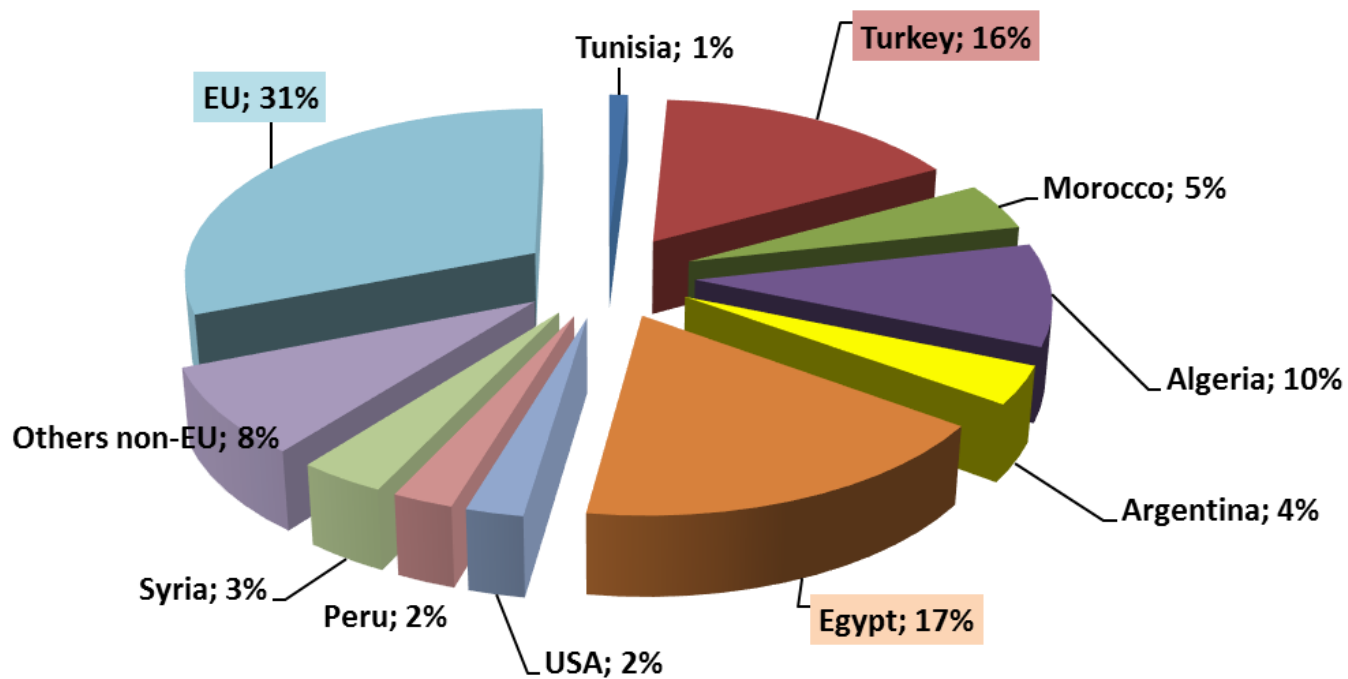
TABLE OLIVES

Production of table olives (1000t)

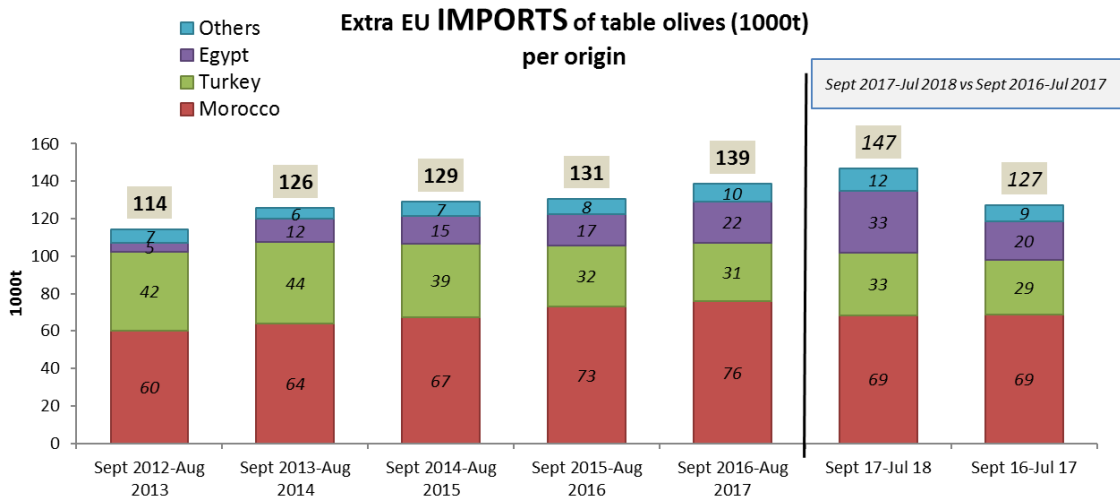


Source: MS declarations in the framework of IOC balance sheets; IOC estimations

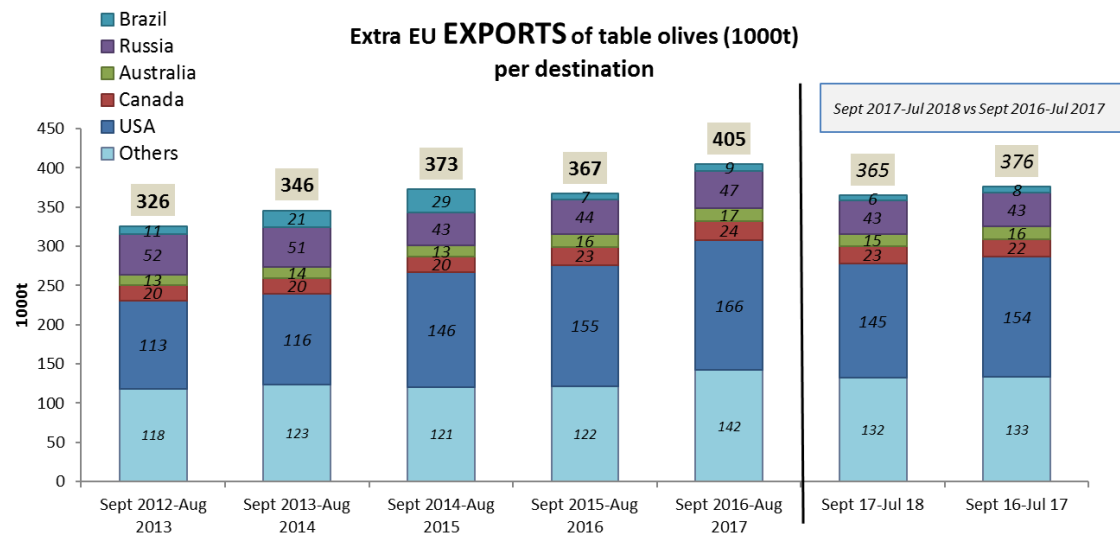
Share on world's production of table olives in 2017/18



Source: MS declarations in the framework of IOC balance sheets, IOC estimations

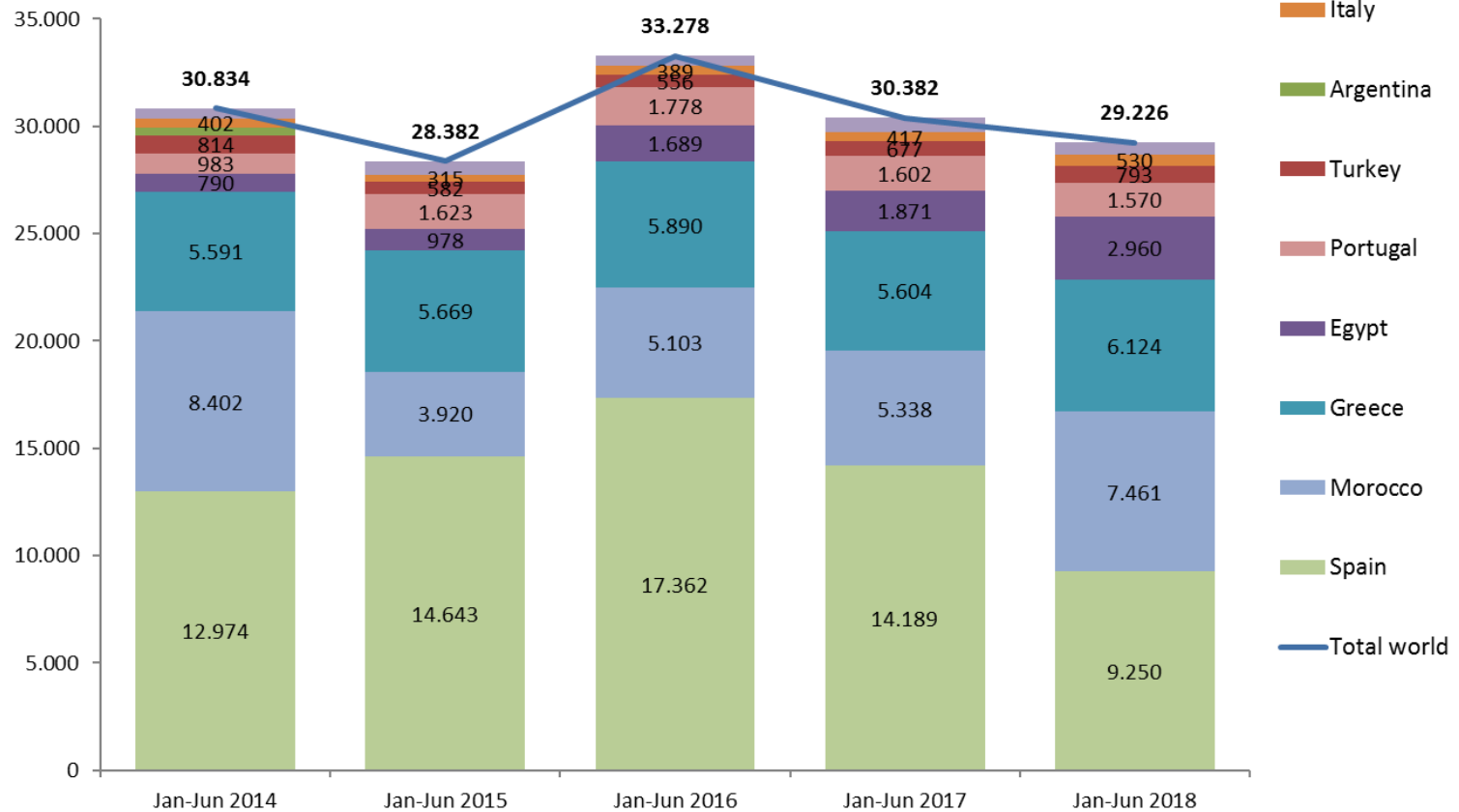


Source: Eurostat/Comext©; CN codes 07099210, 07108010, 07112010, 20019065, 200570



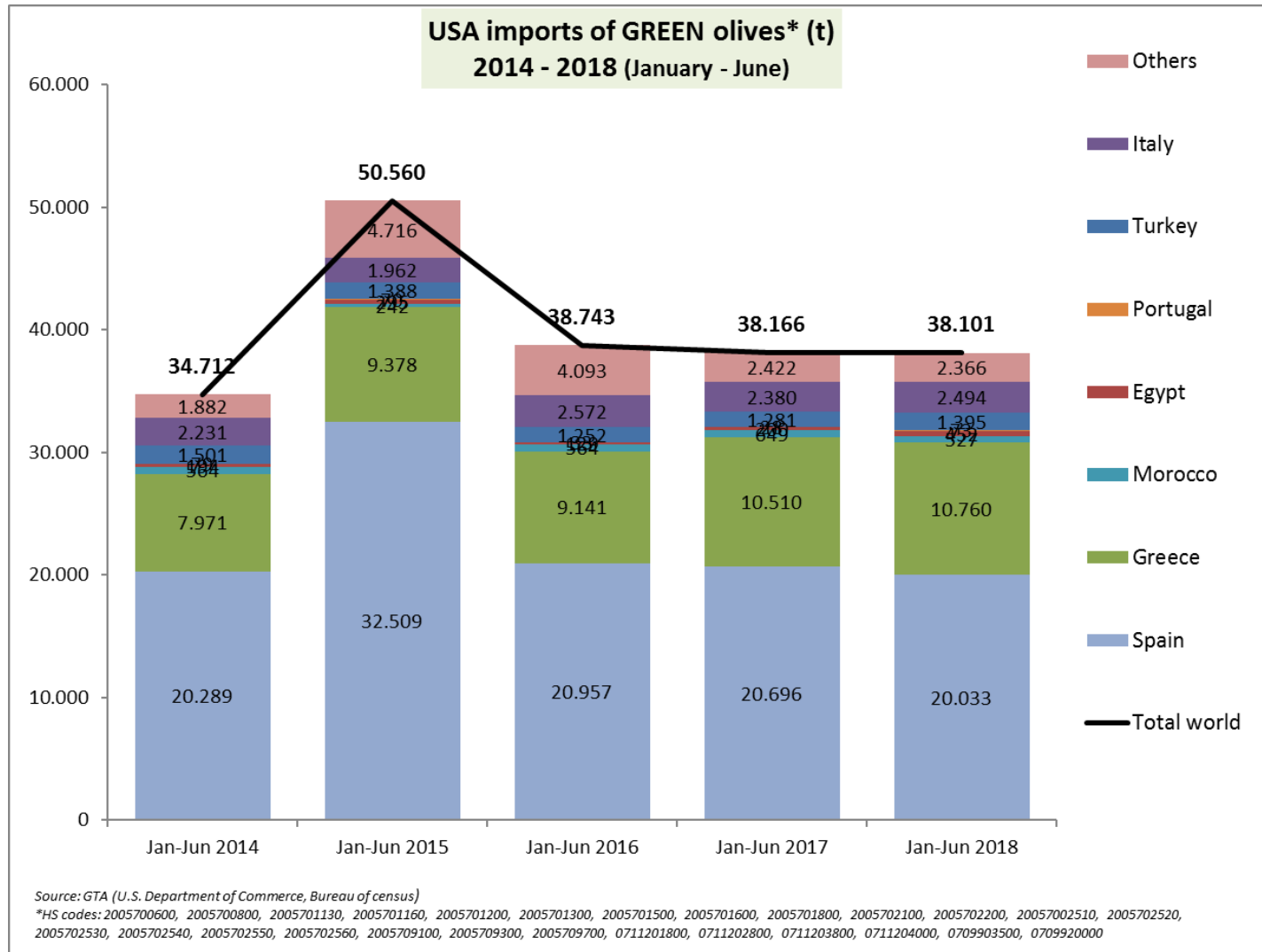
Source: Eurostat/Comext©; CN codes 07099210, 07108010, 07112010, 20019065, 200570

USA imports of BLACK olives* (t) 2014 - 2018 (January-June)



Source: GTA (U.S. Department of Commerce, Bureau of census)

*HS codes: 2005705030, 2005705060, 2005706020, 2005706030, 2005706050, 2005706060, 2005706070, 2005707500, 2005707510, 2005707515, 2005707520, 2005707525, 2005700230, 2005700260, 2005700430, 2005700460, 2005707000



More market information on olive oil:

https://ec.europa.eu/agriculture/olive-oil_en

Thank you



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT
Directorate G. Markets and Observatories
G.4. Arable crops and olive oil

Brussels,
AGRI.DDG3.G.4/SB
[agri.ddg3.g.3\(2018\)5498358](mailto:agri.ddg3.g.3(2018)5498358)

For the attention of the Secretary General of:

***BEUC, Birdlife, CEJA, CELCAA, COGECA, COPA, ECVF, EFFAT, EFNCP, EPHA,
FOODDRINKEUROPE, IFOAM, OEIT, PAN Europe, SACAR***

AGENDA

MEETING OF THE «CDG HOS – OLIVES SECTOR»

**in Brussels, Rue de la Loi 130
11th floor**

Meeting room: A

on Tuesday 9 October 2018, from 09:30 to 18:00

1. Market situation

- Working group on Olives Market Situation and Technical Issues – State of play on the selection of candidates (*DG AGRI*)
- Emerging markets and new producing countries (*Mr. Rafael Pico Lapuente – ASOLIVA (ES)*)
- Presentation on market situation (olive oil and table olives) (*DG AGRI*)
- Medium-term outlook for olive oil (2018-2030) (*DG AGRI*)

2. *Xylella fastidiosa*

- State of play (*DG SANTE*)
- XF-ACTORS project presentation (*Dr. Maria Saponari*)
- POnTE project presentation (*Dr. Maria Saponari*)
- Life resilience project presentation (*Jose Maria Castilla – ASAJA (ES)*)

3. Marketing standards for olive oil

- State of play of the work on-going in the CODEX and in the IOC (*DG AGRI*)
- Panel test update (*speaker to be confirmed*)
- Advisory Group meeting of October 2018 (*Vasileios Pyrgiotis – Chairman of Copa-Cogeca Working Party on Olives and Olive Oil*)

4. Common Agricultural Policy

- Proposal of the Commission for CAP post 2020: strategic plans, sectoral interventions in the OO sector and direct payments (*DG AGRI*)

5. Trade issues

- Tunisia DCFTA (*DG AGRI*)
- US duties on Spanish ripe olives (*DG AGRI*)

Silke BOGER
Head of Unit

c.c.: Ms Boger, Jeandin, Zolichova, Capkovicova, MM. Garcia Navarro, Gadzinowski, Pavon-Gonzalez (DG AGRI), M. Di Rubbio (DG SANTE)

Please send us your AOB questions in due time before the meeting (e-mail: AGRI-MARKET-CDG@ec.europa.eu)