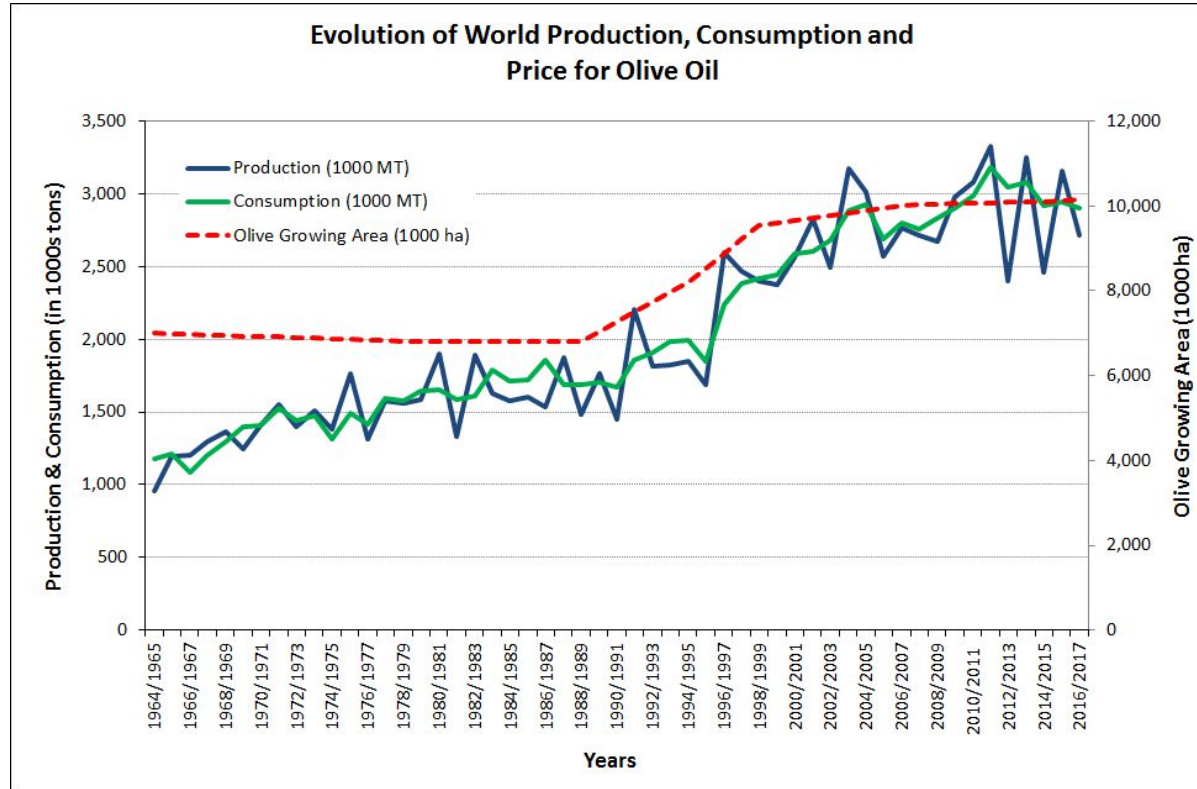


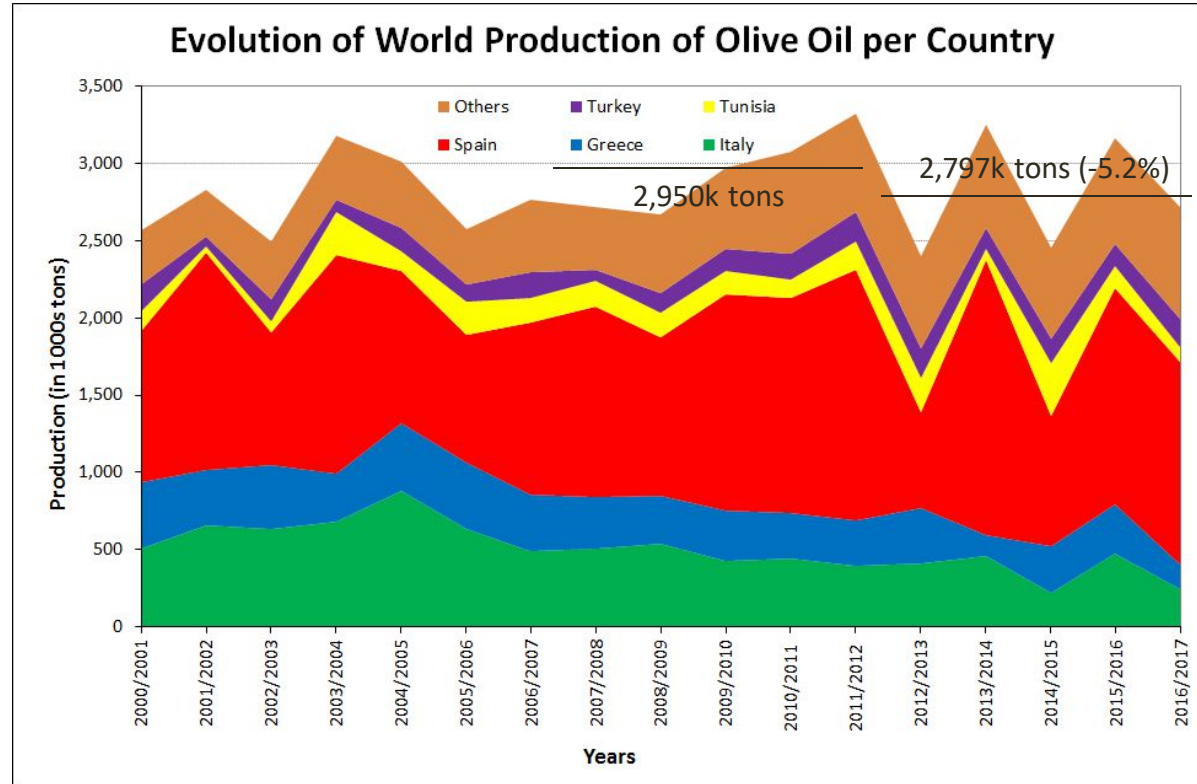
# National Olive Conference Industry Statistics



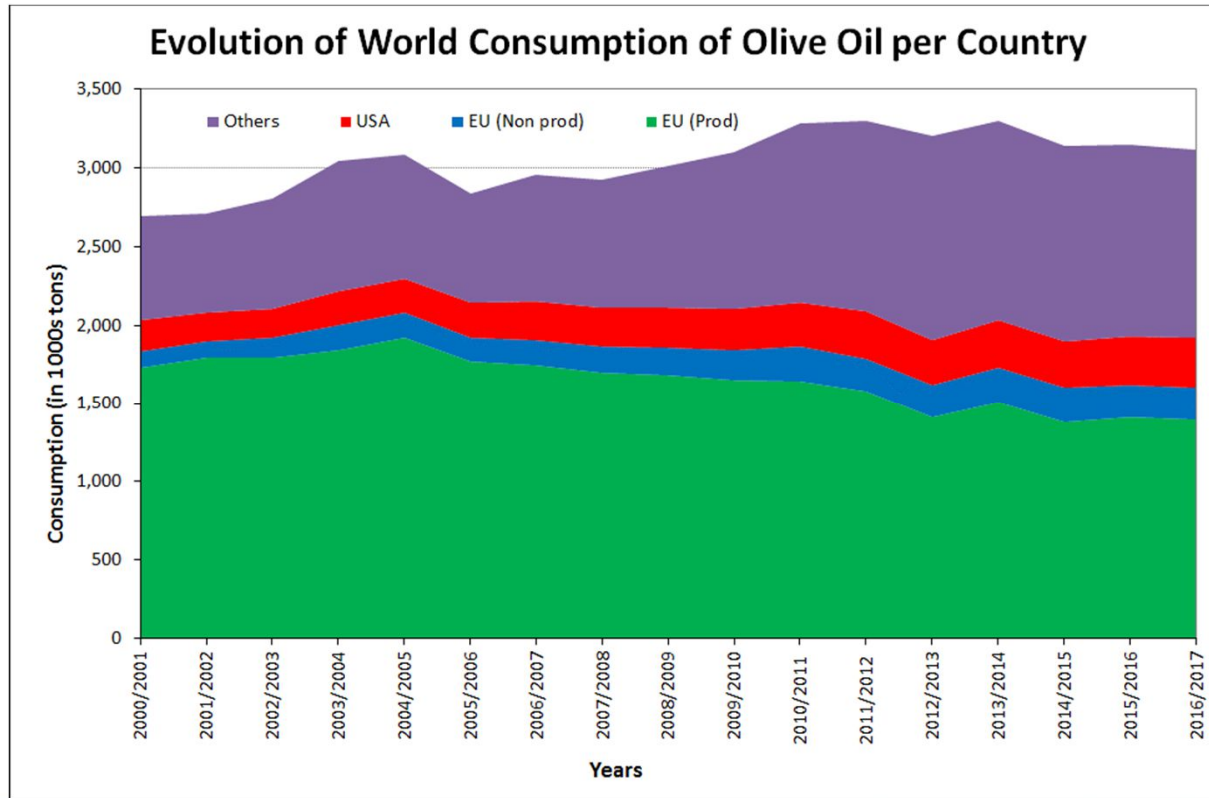
# World Production and Consumption – A bit of history



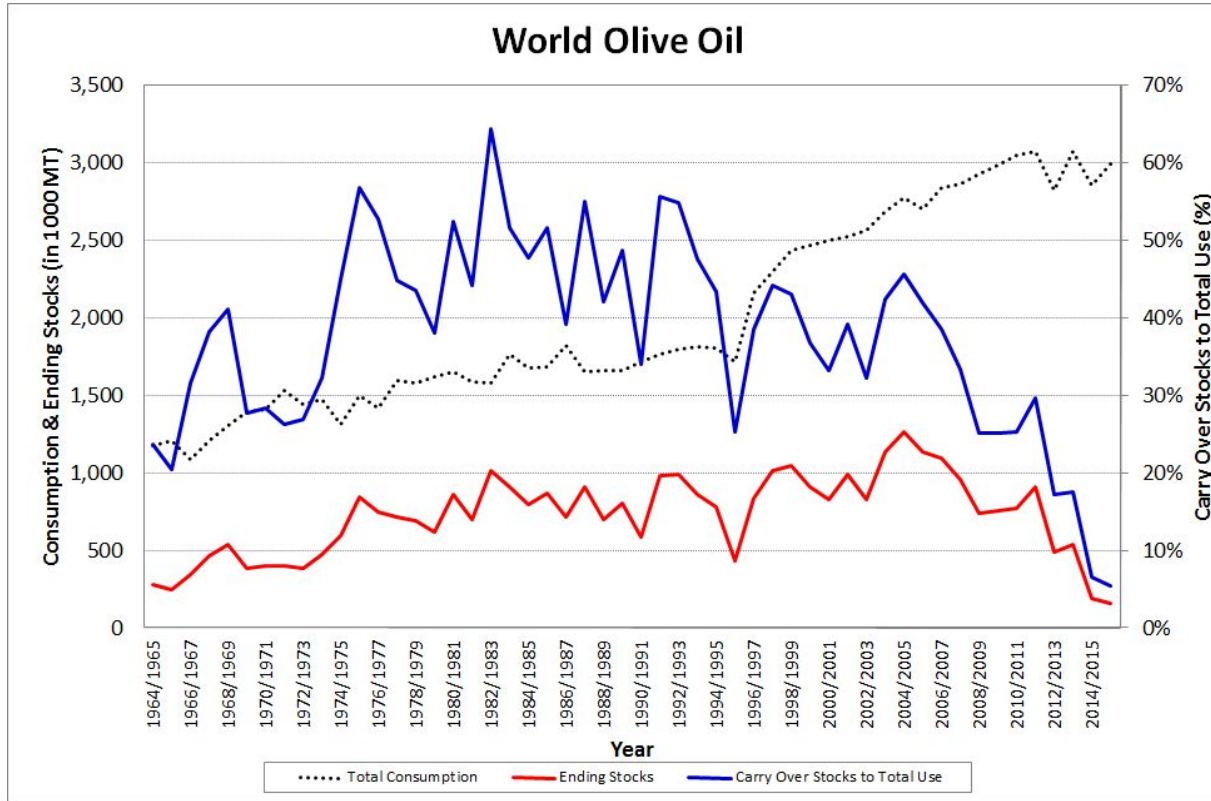
# Alternating and Declining Production



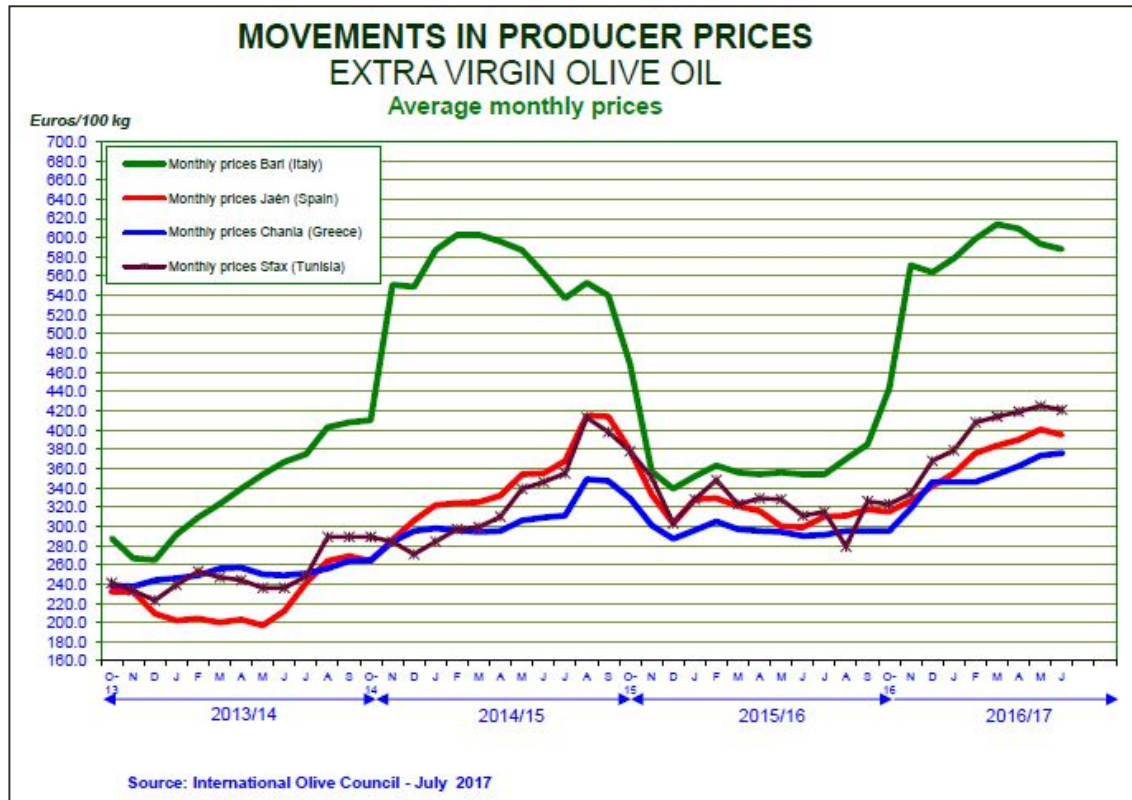
# Declining Production affecting Consumption



# Historically low levels of Stock

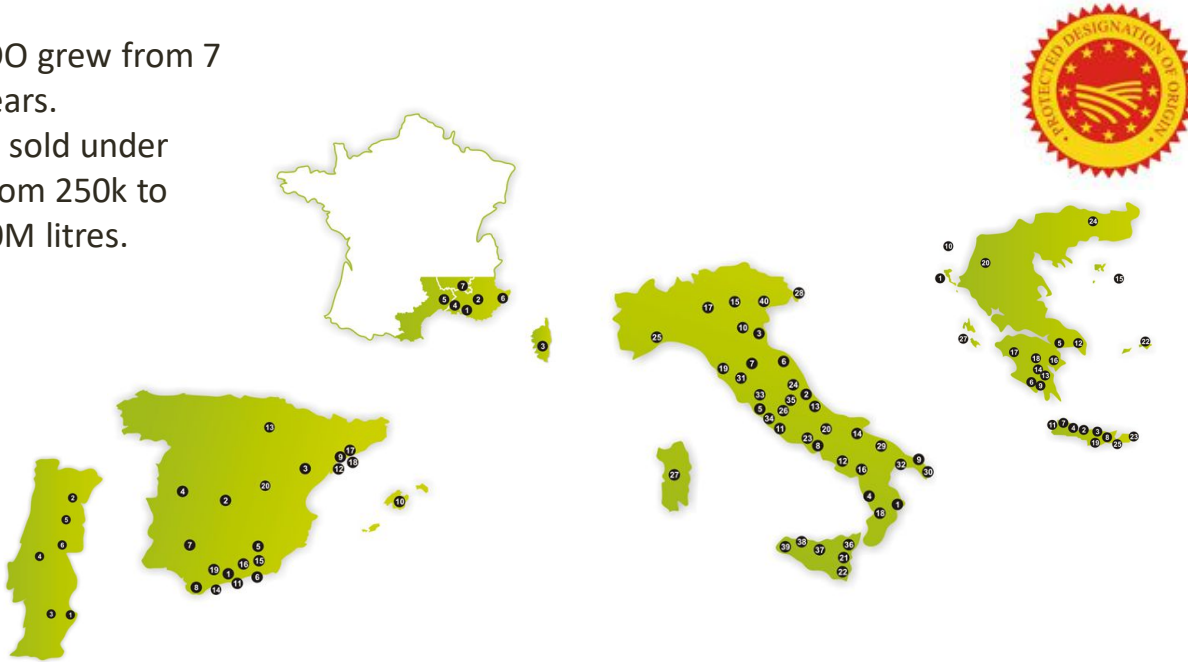


# How does that impact on prices?



# Health and Quality are the growth drivers for Olive Oil

- PODs for EVOO grew from 7 to 98 in 10 years.
- Volume of oil sold under PODs grew from 250k to more than 40M litres.



# Health and Quality are the growth drivers for Olive Oil





# Health and Quality are the growth drivers for Olive Oil

There are more than 1,000 specialty olive oil stores in the USA at the moment. There were less than 10 eight years ago.

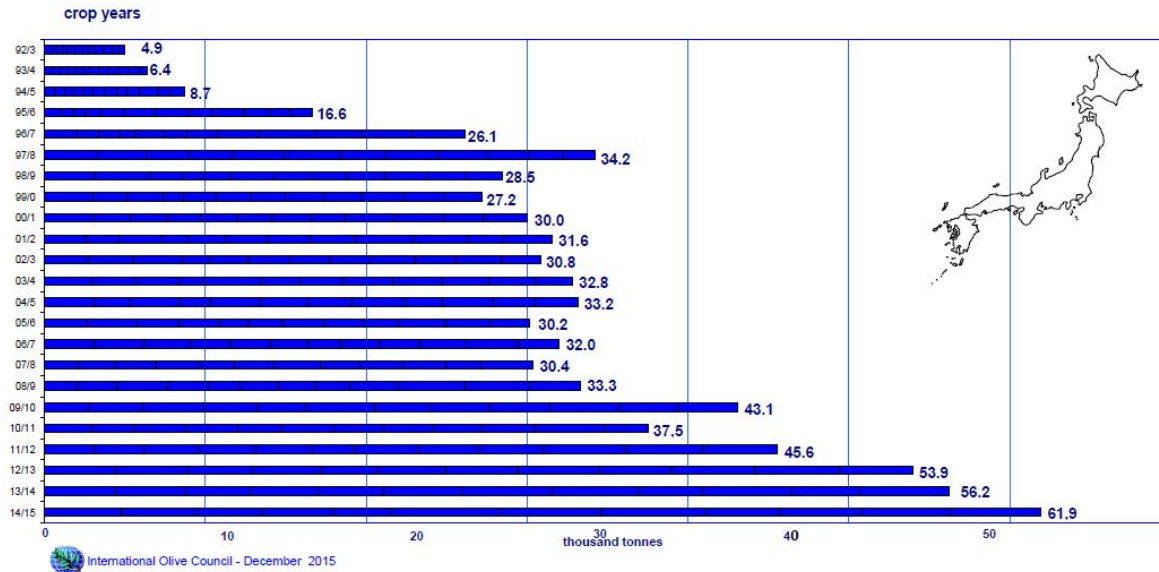


# Health and Quality are the growth drivers for Olive Oil

## JAPAN: OLIVE OIL IMPORTS

(including Olive-Pomace Oils)

Cumulative monthly imports by crop year \*



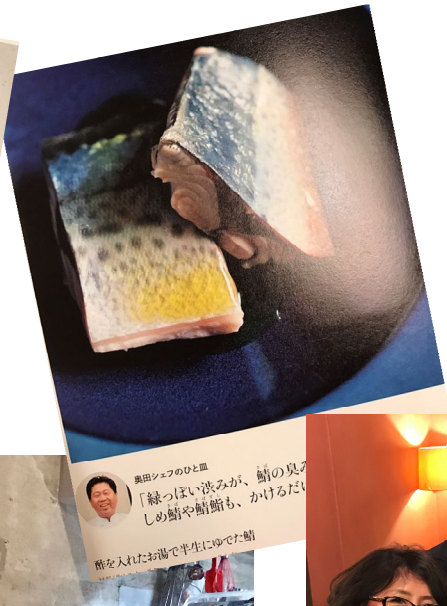
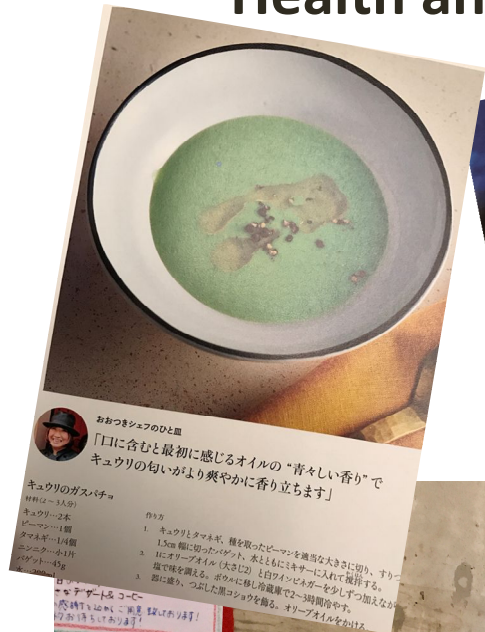
\* Crop year: Twelve-month

Prior to 2005/06, period from 1 November to 31 October

As of 2005/06, period from 1 October to 30 September



# Health and Quality are the growth drivers for Olive Oil



# Health and Quality are the growth drivers for Olive Oil



纯正

9折



**COCO-BABY** 原装进口100%正品



# Health and Quality are the growth drivers for Olive Oil

オリーブオイルはヘルシーなオイルと知られています。今回は、オリーブオイルの特長を調べてみましょう。また、身体の内側から美しくなる「簡単・上手なオリーブオイルの摂り方」も紹介します。みんなでオリーブオイルを楽しく摂りましょう！



**オリーブオイルはヘルシーなオイル**

**自分の内側から美しくなる!**

- 1. 緑黄色野菜と食べる**  
オリーブオイルが緑黄色野菜にき 合われる。βカロチンの吸収を促進します。
- 2. 天ぷら油に混ぜる**  
天ぷら油を揚げるときに、サラダ油にオリーブオイルを大さじ2〜3粒入る。揚げ上がりがあり、風味もよくなります。
- 3. ご飯に入れて炊く**  
炊く前に沸かしたお湯のオリーブオイルを大さじ1杯を加える。お味増しにオリーブオイルを少量入れると、ご飯が美味しく仕上がります。
- 4. 味噌汁に少量入れる**  
味噌汁の風味にほんのりかき混ぜると、風味がよくなります。
- 5. パンにつけて食べる**  
焼き立てのパンに、オリーブオイルを少し塗るだけ。パンがおいしくなり、オリーブオイルの香り、風味がマツル。いつもよりおいしく食べられます。

愛い方は、とってもカンタンだよ！試してみてくださいね！

**オリーブオイルソムリエ 水野 勢世が教える**

一緒にオリーブオイルを楽しく学びましょう!

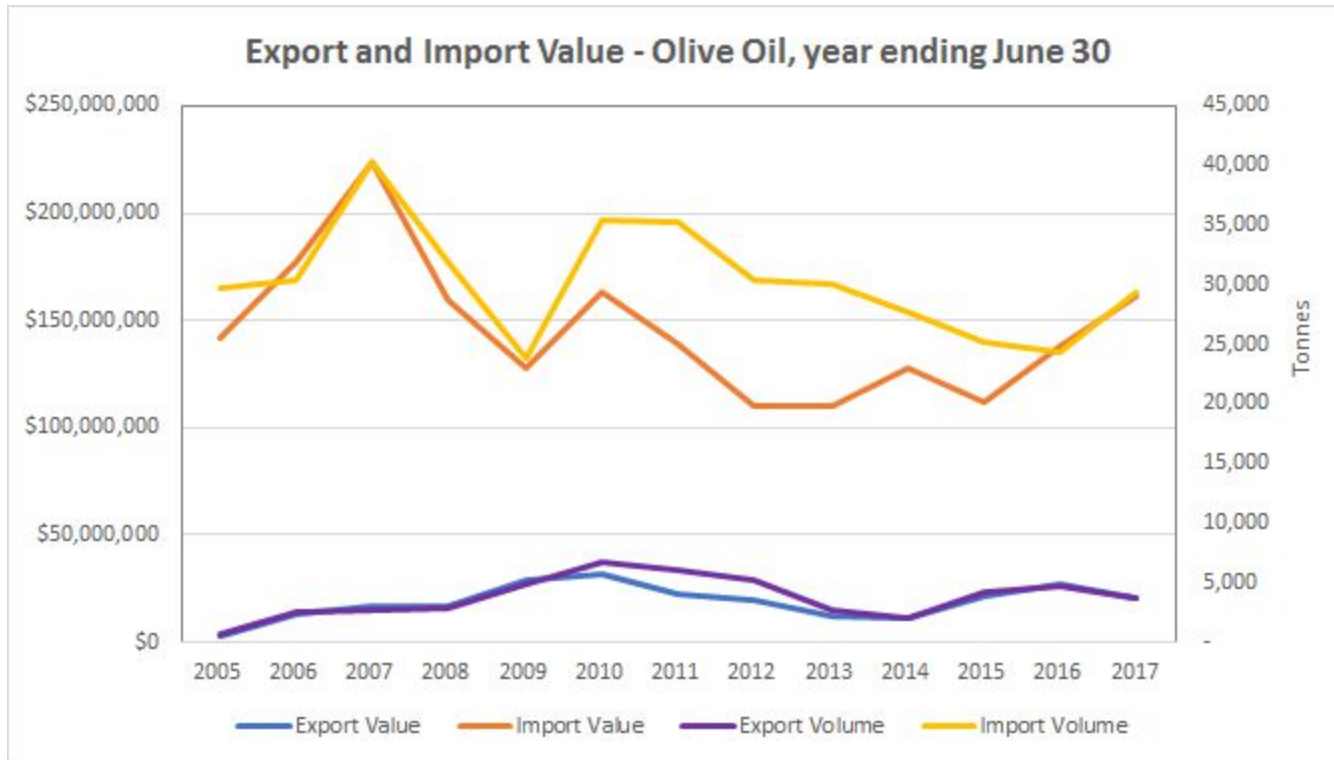
**オリーブオイル 学園**

皆さん、オリーブオイルについてどこまでご存知ですか？  
オリーブオイルはつくられる国や地域によって味わいや香りも様々。  
例えるならワインのように深く広い世界を持っていることは良くわかることですね。  
「オリーブオイルは、健康利なのか？ 質なのか？」、「オリーブオイルを楽しむための選び方」など、知られざるオリーブオイルの世界を皆さんと楽しく学んでいきましょう。

オリーブオイルソムリエ 水野 勢世



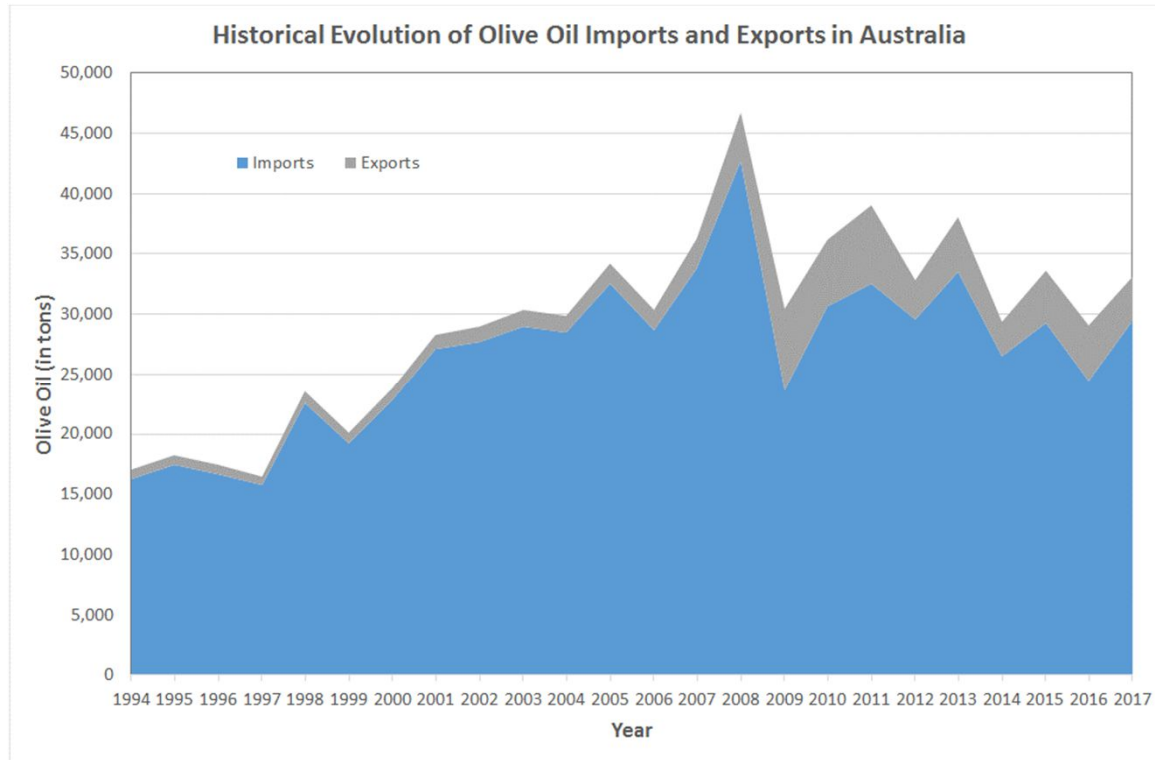

# What about Australia?



Source: IHS Global Trade Atlas 2017



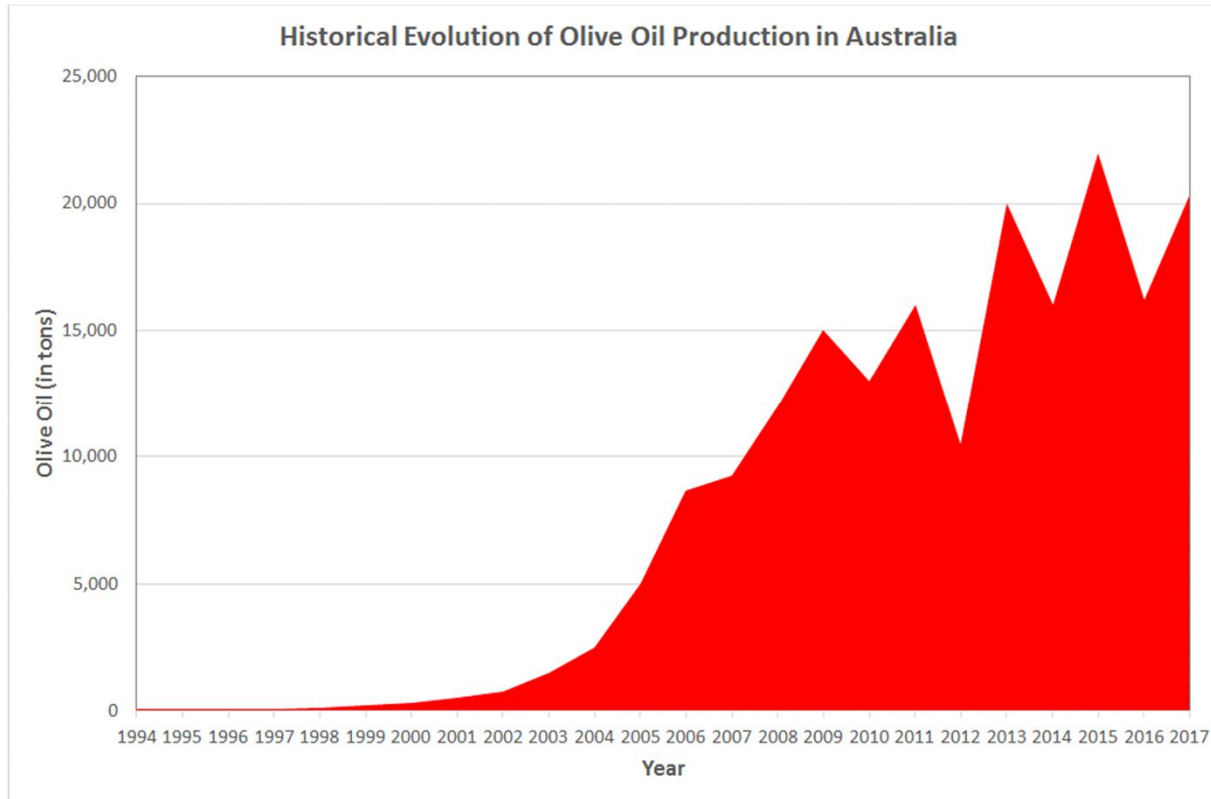
# What about Australia?



Source: IHS Global Trade Atlas 2017 & Australian Customs

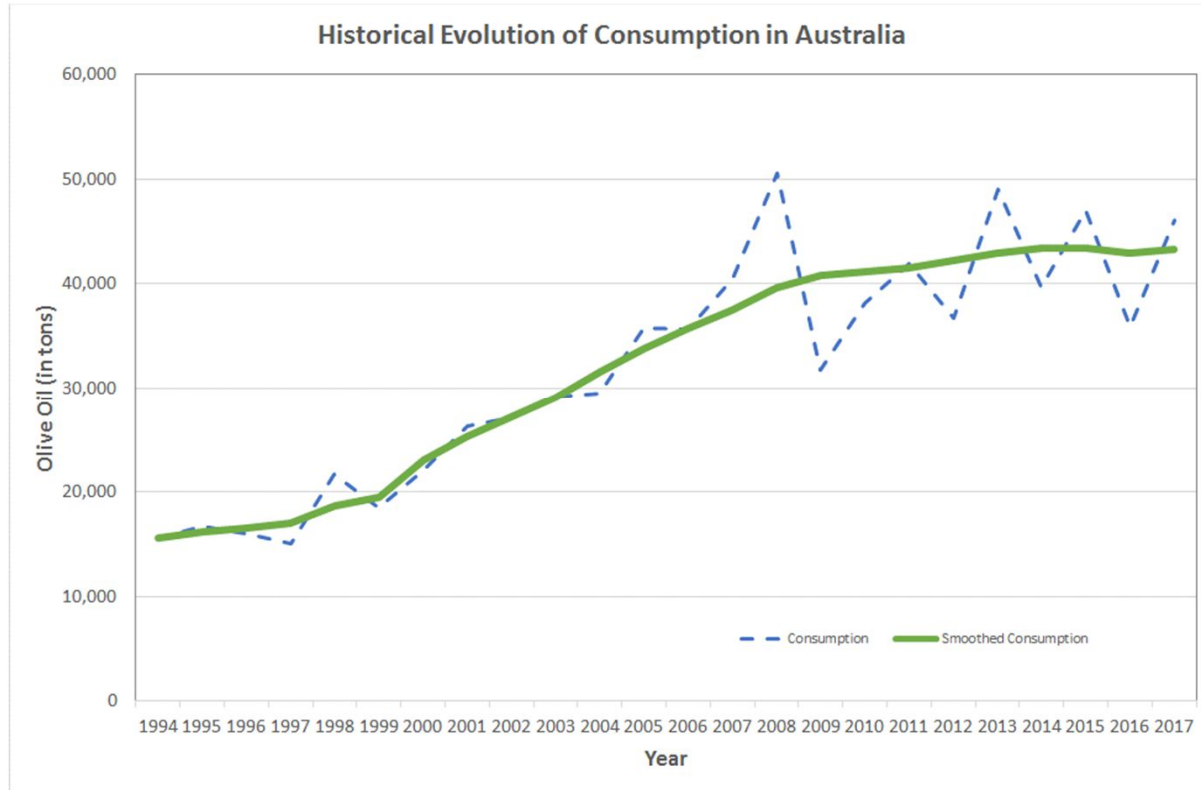


# What about Australia?



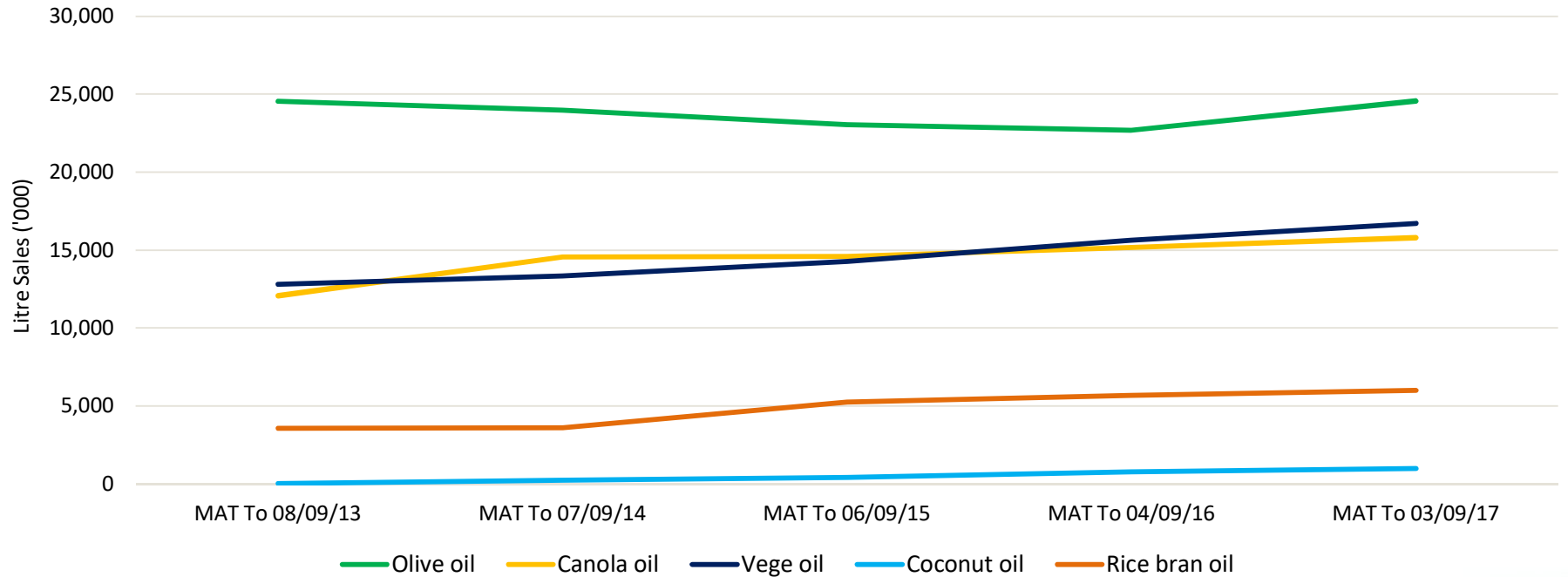


# What about Australia?



# Consumption of Cooking Oil in Australia is growing year on year

## Woolworths & Coles Cooking Oil Litre Sales



MAT = Moving annual total

Cooking Oil Category  
Growth

+5.0%

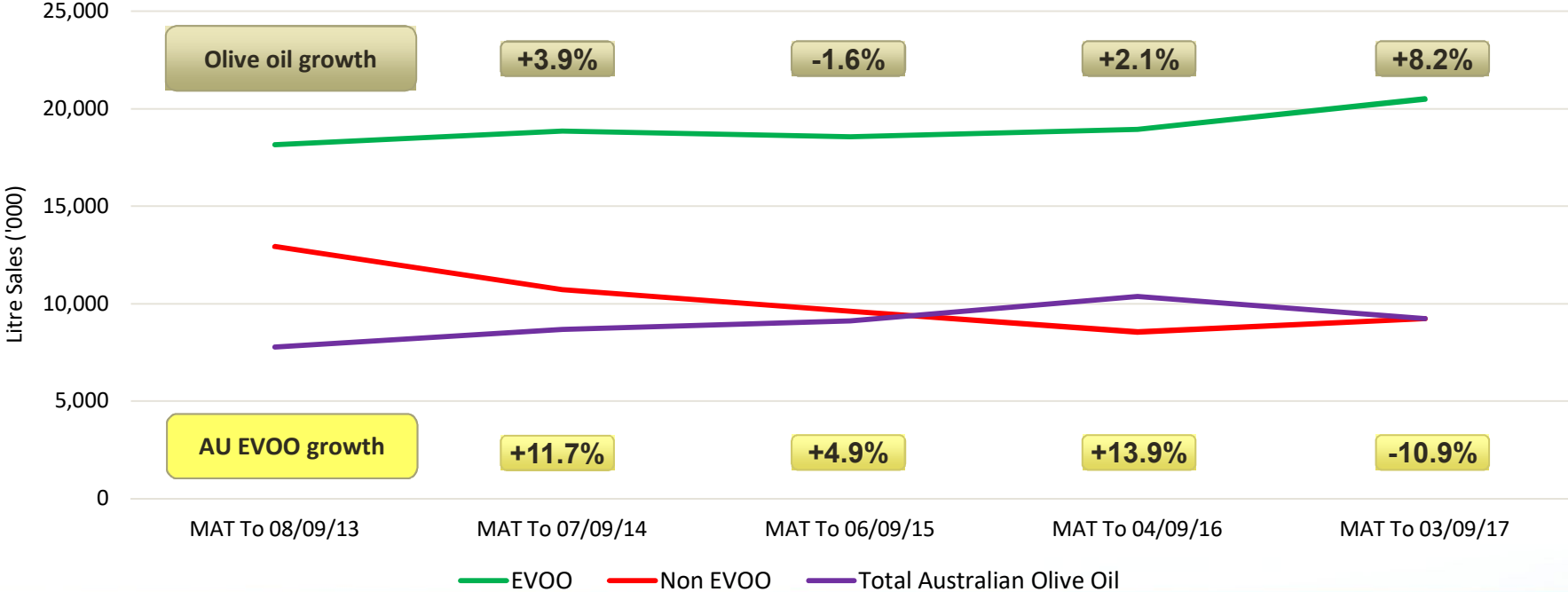
+3.4%

+4.2%

+6.9%

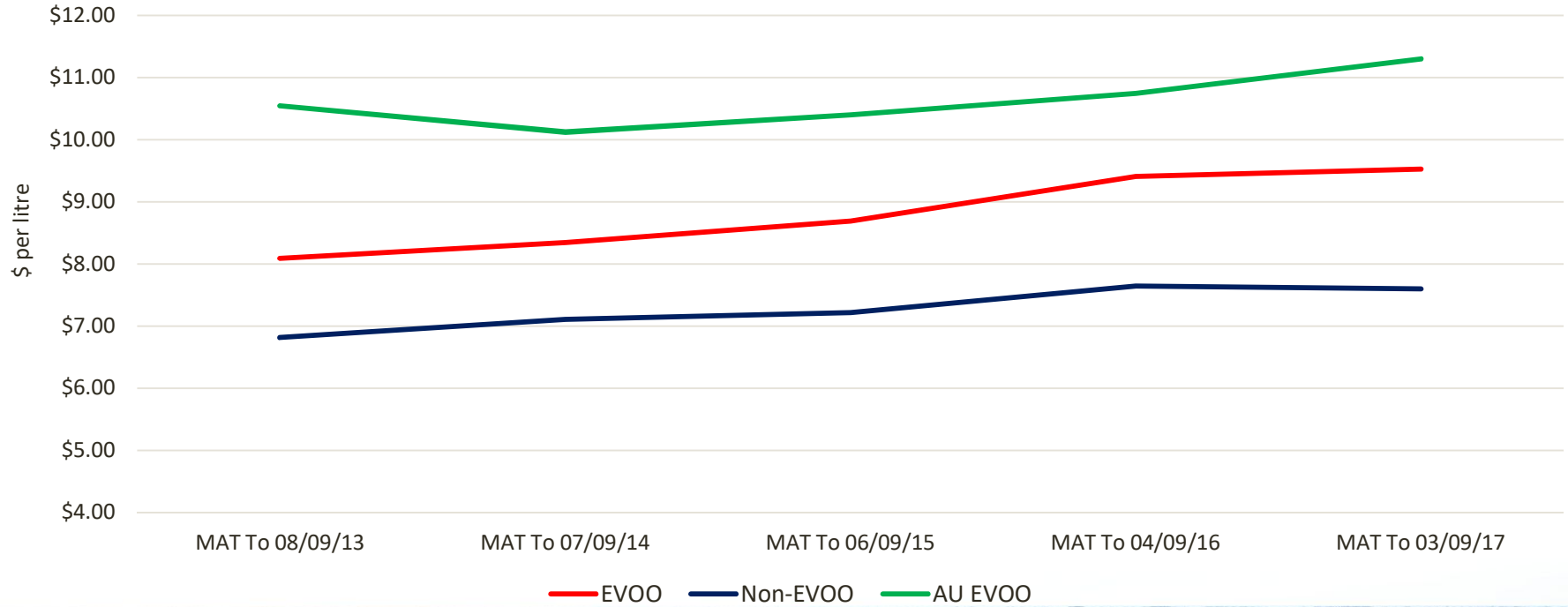
# Olive oil bounces back, however Australian Olive Oil consumption declined due to lack of available EVOO from 2016 harvest

## Woolworths & Coles Olive Oil Litre Sales



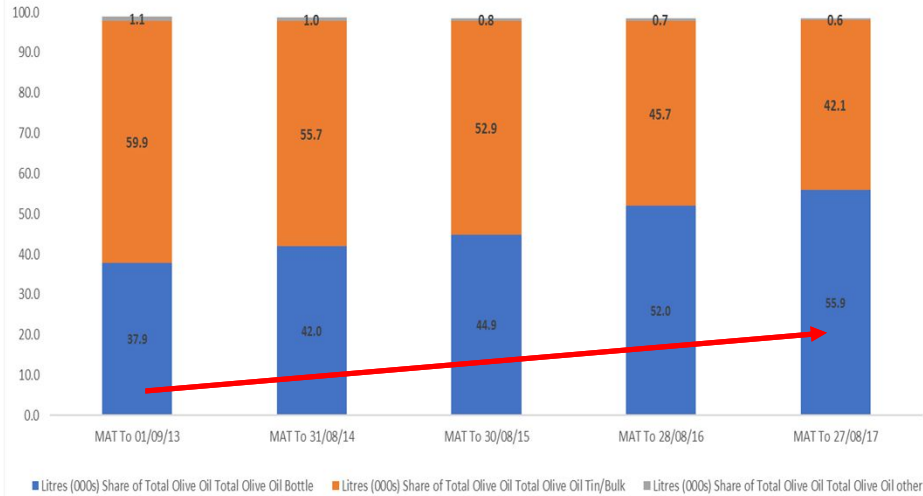
# Australian EVOO \$/L continues to rise and lead the market

## Woolworths & Coles Olive Oil \$/L

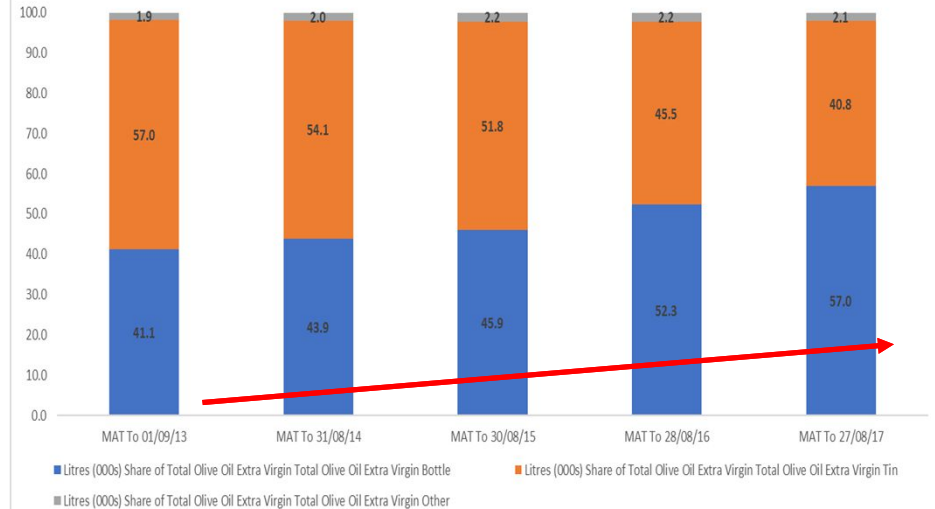


# We are seeing a trend of consumers buying more and more bottles than bulk formats (tins).

Litre Share of Olive Oil by Pack Type

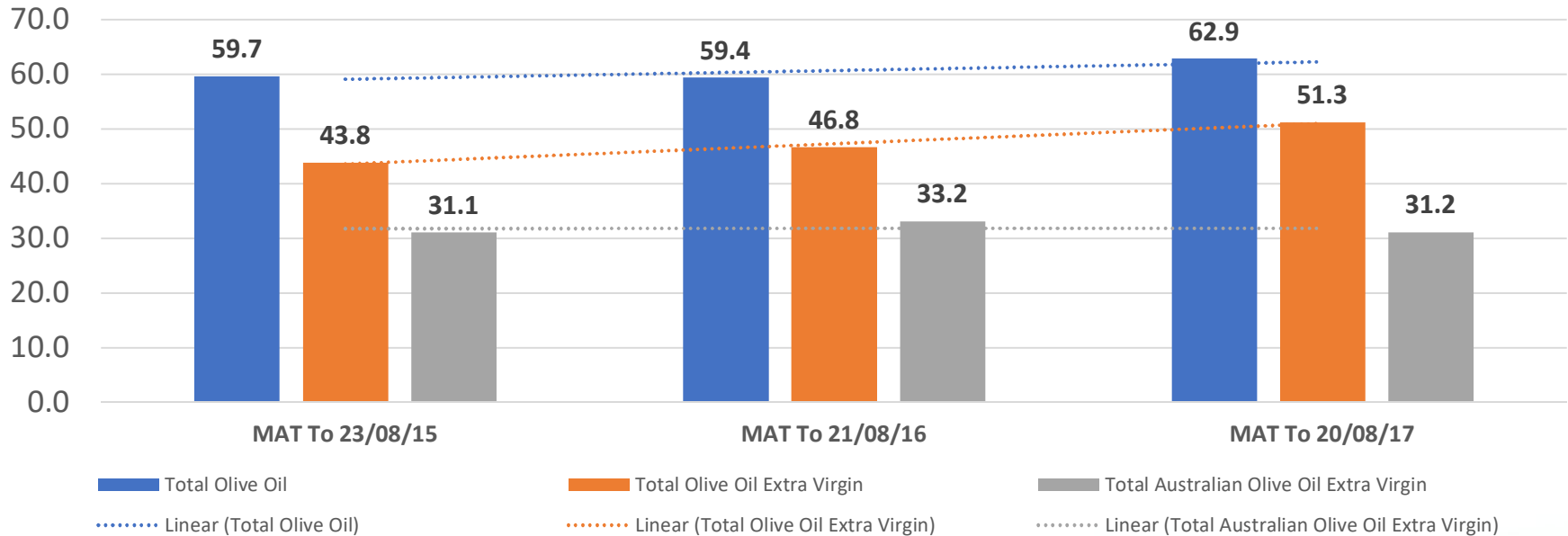


Litre Share of Extra Virgin Olive Oil by Pack Type



# Over the last 3 years more households purchase Olive Oil and EVOO... But not the case for AUS EVOO! We have work to do!

Household Penetration in %



## Opportunities for us to grow the AEVOO together

**Support and contribute to the AOA  
Everyday Extra Virgin Olive Oil  
platform!**



**Educate Australians to only buy  
Australian Extra Virgin Olive Oil**



# Help BUST THE MYTHS for Australians to make the **best choice** when buying Cooking Oil

*‘What’s the difference between EVOO and OO?’*



*‘I can’t cook with Extra Virgin Olive Oil’*



*‘Why should I buy Australian?’*



**FACT**

Australian Extra Virgin Olive Oil is the freshest and healthiest oil

**FACT**

Australian Extra Virgin Olive Oil is one of the most stable and safest oil in the market

**FACT**

Australian Extra Virgin Olive Oil is the best oil available!

