

## Australian Table Olives - An Overview 2019

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### Global production of table olives:

The top producers of table olives by country<sup>1</sup> are (1000s tonne):

Country	2015/16	2016/17	2017/18	2018/19 (provisional)
Spain	601	596	562	588
Turkey	397	401	450	424
Egypt	336	550	750	400
Algeria	221	293	304	300
Greece	194	180	261	167
Morocco	120	120	130	130
Syria	150	190	100	100
Argentina	73	96	106	80
Peru	56	79	70	70
Iran	61	76	60	60
Italy	66	40	60	40
<i>(Australia)<sup>2</sup></i>	<i>3.0</i>	<i>3.0</i>	<i>3.0</i>	<i>3.0</i>
World	2,577	2,899	3,284	2,569

<sup>1</sup> International Olive Council- December 2018

Ref: [https://www.internationaloliveoil.org/wp-content/uploads/2019/11/production3\\_ang.pdf](https://www.internationaloliveoil.org/wp-content/uploads/2019/11/production3_ang.pdf)

<sup>2</sup> Australian Olive Association

### Australian table olive production:

According to industry estimates there are some 125 table olive producers across Australia with a total grove area of around 1,000 hectares, producing an estimated 3,000 tonne of fruit per annum. Ours is largely a boutique industry, with 80% of table olive producers having less than 5 hectares, and only 5 known producers with more than 40 hectares – by far the largest being Tree Tops Plantation (Riverina Oils & BioEnergy Pty Ltd) situated in the NSW Riverina with 125,000 trees producing 1,000 tonne of table olives per year. The major olive production states are NSW, SA, WA and VIC.

### Major Exporters of Table Olives:

The top exporters of table olives by country<sup>1</sup> are (1000s tonne):

Country	2015/16	2016/17	2017/18	2018/19 (provisional)
Spain	177	177	168	177
Egypt	56	107	120	100
Morocco	88	86	90	90
Greece	73	78	77	85
Turkey	72	58	68	65
Argentina	56	61	55	45
Peru	24	21	22	22
Portugal	13	13	13	13
Italy	13	13	13	12
(Australia) <sup>2</sup>	0.208	0.243	0.085	0.080
World	611	652	659	638

<sup>1</sup> International Olive Council- November 2018

Ref: [https://www.internationaloliveoil.org/wp-content/uploads/2019/11/exportations3\\_ang.pdf](https://www.internationaloliveoil.org/wp-content/uploads/2019/11/exportations3_ang.pdf)

<sup>2</sup> Australian Horticulture Statistics Handbook (Hort Innovation)

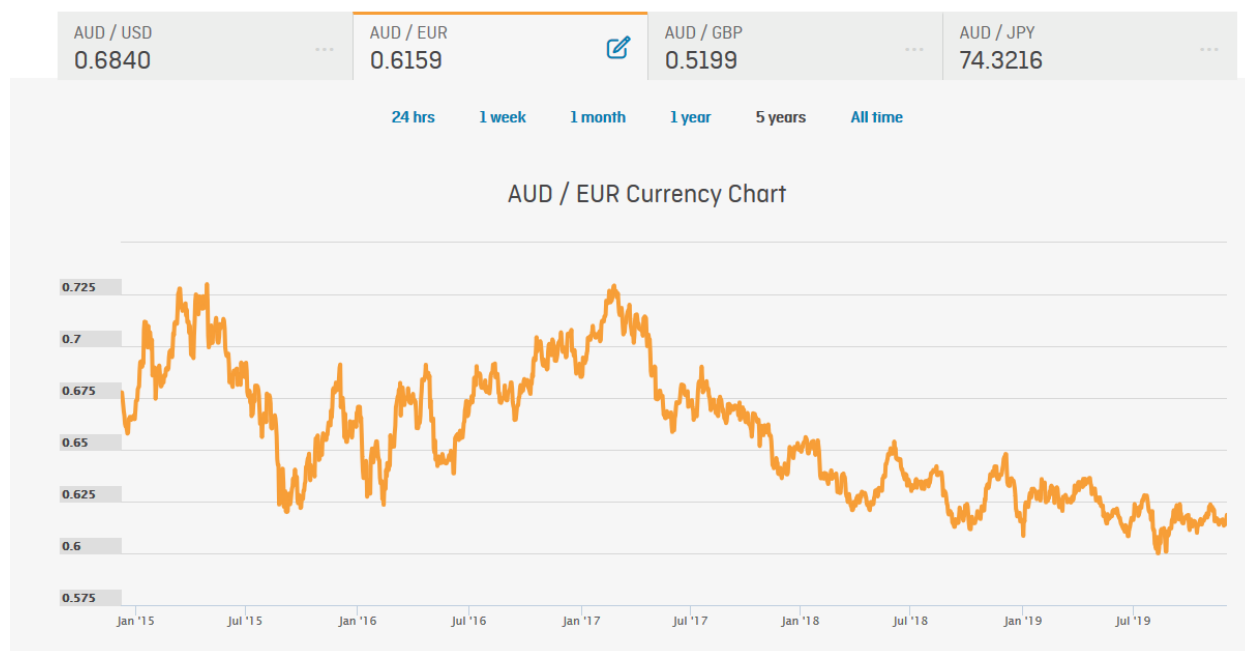
**Australian table olive exports<sup>1</sup>** in the 2018-2019 reporting period was 80 tonne, with a total value of A\$0.4 million.

**Domestic and export market conditions** remain challenging for table olive producers with Australian supermarket shelves dominated by cheap imported products. However, the Australian Dollar (A\$)<sup>2</sup> has significantly depreciated against the euro (EUR) from a high of 0.86 in August

<sup>1</sup> 2018-19 Australian Horticulture Statistics Handbook (Hort Innovation)

<sup>2</sup> OzForex: <https://www.ofx.com/en-au/forex-news/>

2012 to a low of 0.62 in November 2019. The lower Australian Dollar serves to make imports more expensive, exports more competitive (although this is not reflected in export data), and applies upward pressure on domestic wholesale prices.



The quality of Australian table olives is of a high standard, but ours is a small developing industry that primarily supplies the local boutique market, and small retailers. These enterprises will need to be scaled up if they are to achieve the price points and reliability of supply required by the major retail chains.

## Major Importers of Table Olives:

The top importers of table olives by country<sup>1</sup> are (1000s tonne):

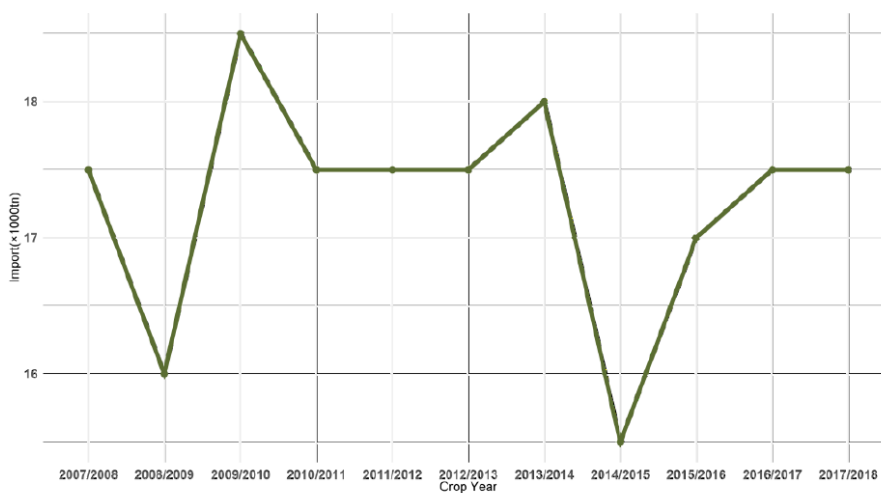
Country	2015/16	2016/17	2017/18	2018/19 (provisional)
USA	154	146	141	140
Brazil	102	114	110	110
EU	94	99	103	98
Canada	30	28	31	30
Saudi Arabia	26	28	28	28
(Australia)	17.0	17.5	17.5	17.5
World	609	636	636	625

<sup>1</sup> International Olive Council- November 2018

Ref: [https://www.internationaloliveoil.org/wp-content/uploads/2019/11/importations3\\_ang.pdf](https://www.internationaloliveoil.org/wp-content/uploads/2019/11/importations3_ang.pdf)

## Table olive imports to Australia:

According to IOC<sup>3</sup> data, Australia imported around 17,000 tonne of table olives in each of the last 11 crop years, reaching 17,260 tonne in the 2017/18 crop year, or 2.7% of world imports.



Graph IV – Imports of table olives 2005/06 – 2017/18 (x1000 t)

Greece stands out as the main supplier to Australia, with 60.2% of the imported volume (10,385 tonne), followed by Spain with 22.4% (3,861 tonne), Italy 5.4% (932 tonne) and Turkey with 4.5% (770 tonne). The remaining source countries total 7.6%.

<sup>3</sup> IOC Newsletter #143 November 2019

Country	2017/2018
GREECE	10.385,1
SPAIN	3.860,8
ITALY	932,0
TURKEY	770,3
MOROCCO	455,6
EGYPT	279,1
PERU	163,0
ARGENTINA	122,8
LEBANON	98,8
GERMANY	53,7
ISRAEL	37,0
JORDAN	29,4
MACAO	13,7
PORTUGAL	12,3
FRANCE	11,8
CHILE	11,3
Others	23,4
<b>TOTAL</b>	<b>17.259,9</b>

**Australian apparent consumption of table olives<sup>2</sup>** (domestic production plus imports, minus exports) for 2018/19 is estimated at 21,500 tonne or 0.9 kg / person, with imported table olives comprising at least 75% of Australian domestic consumption, highlighting the opportunity for import replacement.

Ref: [https://www.internationaloliveoil.org/wp-content/uploads/2019/11/consommation3\\_ang.pdf](https://www.internationaloliveoil.org/wp-content/uploads/2019/11/consommation3_ang.pdf)

## **OliveCare® and Table Olives:**

The AOA has rebranded and relaunched its Code of Best Practice program as *OliveCare®*.



The *OliveCare®* program provides a quality systems approach to manage risk and underpin product quality and consumer confidence in Australian olive products.

The program has been expanded to include EVOO, flavoured olive oil, table olives and other olive products, and encompasses the entire olive supply chain from growers to the market place, including grove management, olive processing, product storage, retail and export supply channels.

More than 140 *OliveCare®* certified brands including 20 table olive brands are listed by state of origin on the 'Everyday Australian Extra Virgin' website: [australianextravirgin.com.au/brands/](http://australianextravirgin.com.au/brands/)

Table olive products that satisfy the requirements of the *Certified Australian Table Olives™* logo under the *OliveCare®* Code of Best Practice are authorised to display the following logo:



*OliveCare®* Signatories also receive a monthly newsletter packed with useful information and tips on everything from grove management to marketing.

### ***OliveCare®* Table Olive Compliance:**

**All Signatories are required to provide the *OliveCare®* Administrator evidence of:**

- Having a **Product Risk Assurance** or HACCP style food quality plan - either 'in-house' or as part of a proprietary third party audited certification arrangement, (*AOA template available*), the plan should include:
  - Use of a **Corrective Action Request (CAR)** procedure to deal with quality complaints, negative feedback, audit failures, on-farm inefficiencies, accidents or lapses in processes, procedures or performance (*AOA template available*);
  - Use of a documented **product trace back system** including unique batch codes, supply chain records and a product recall system in place (*AOA template available*);
- Undertaking **annual product testing** at a NATA accredited laboratory, meeting the requirements of *The Voluntary Industry Standard for Table Olives in Australia (RIRDC 2012)* for each product to be certified under the *OliveCare®* Industry Code of Best Practice, including:
  - **Physico-chemical** parameters (for natural olives - pH < 4.3, salt > 6.0 g/100ml);
  - **Microbiological** testing for *E coli* (< 3 cfu); and *Clostridium perfringens* (< 10 cfu), for pasteurised products the laboratory also tests for *Lactobacillus*, to measure effectiveness of pasteurisation (< 10 cfu); plus
  - **Sensory assessment** undertaken by Modern Olives (or through participation in the AIOA or other recognised table olive competition).

- Using product **Best Before Dates**, not exceeding 2 years as determined by the producer, (after which time undesirable changes to the odour, colour, texture or flavour of the product may occur) (Ref: FSANZ – Food Standards Code Part 1.2.5);
- Observing Good Manufacturing Practice (GMP) and Good Hygienic Practice (GHP); including providing a **declaration of Table Olive storage conditions** - this form can be downloaded at: <https://australianolives.com.au/sign-up-to-olivecare/>
- Compliance with the Australia New Zealand Food Authority (ANZFA) Food Standards Code, **Schedule 20 – Maximum residue limits**, including use of a spray diary, correct storage of chemicals and completion of a **declaration of agri-chemical use** - this form can be downloaded at: <https://australianolives.com.au/sign-up-to-olivecare/>
- Having **product labels compliant** with *The Voluntary Industry Standard for Table Olives in Australia (RIRDC 2012)*, Australian Consumer Law (ACL) and OliveCare® (*providing copies of all product labels to be certified*).
- All olive producers are encouraged to implement an **on-farm biosecurity plan** using the Farm Biosecurity Action Planner template: <http://www.farmbiosecurity.com.au/planner/>

### How can I become an OliveCare® Signatory?

A single membership fee now covers certification of EVOO, flavoured olive oils, and table olive and other olive products. OliveCare® membership fees for small producers are only \$110 per annum, and for most others only \$330 per annum – a small investment for ready access to best practice production technical information and guidance from the OliveCare® Administrator.

Further information on olive care and how to join is available on the AOA website at: <https://australianolives.com.au/sign-up-to-olivecare/>

**Note:** Australian table olive producers who are interested in including table olives in their OliveCare® accreditation should contact the Code Administrator on 0418 839 836 or email [olivecare@australianolives.com.au](mailto:olivecare@australianolives.com.au).

### ACCC on ‘Credence Claims’:

- If a product label uses the term ‘Premium’ EVOO, the brand owner is making a ‘Credence Claim’, on which the ACCC provides salutary advice:  
<http://registers.accc.gov.au/content/index.phtml/itemId/1047883>
- If for marketing purposes a producer makes a Credence Claim, there is a legal expectation that the claim can be substantiated; otherwise it can be argued that these claims are misleading to consumers who are not in a position to be able to verify these claims.
- Substantiation would include table olive products certified against the *Voluntary standard for table olives in Australia (RIRDC 2012)*, meeting quality parameter requirements for classification as ‘Premium’ table olives.

## EU “Kalamata” PDO



### *Ελιά Καλαμάτας (Elia Kalamatas)*

AOA has had substantial input into the EU-FTA negotiation process and is working with the Government to maximise opportunities and minimise any impact the EU-FTA might have on the olive industry, including Geographical Indications (GI's), specifically the proposed EU PDO:

#### **“Kalamata”: Table Olives**

- *Table black, ripened, brined olives produced from the "KALAMON" variety of olive.*
- *All steps of production must take place in the administrative boundaries of the Regional Unit of Messinia, which is a subdivision of the Region of the Peloponnese (Greece).*
- *EU PDO “Kalamata” Table Olives:*  
<https://dfat.gov.au/trade/agreements/negotiations/aeufta/public-objections-gis/Documents/75f.docx>

#### **AOA has submitted:**

- The word ‘Kalamata’ is widely recognised globally as a variety of olive tree that is grown all over the world; and Kalamata is the most popular variety used for producing table olives in international markets.
- The Kalamata variety has been grown in Australia for well over 100 years. Australian Kalamata table olives and Kalamata olive oil have been marketed domestically and internationally for over a century.

#### **Table olives disadvantaged by HSRS Review:**



- The Australian Nutrient Reference Values (NRVs) were revised in July 2017 by the NHMRC, replacing the previous recommendation to limit sodium; intake for adults to less than 2,300mg per day, with a revised Suggested Dietary Target (SDT) of 2,000mg of sodium per day (=5g of NaCl);
- Noting the weight of common salt (NaCl) is a combination of 40 percent sodium and 60 percent chloride ions;
- Most Australian adults have a daily salt intake of about 10 grams or double the Suggested Dietary Target (SDT).
- A 20g serve of table olives prepared in a 6% salt brine would contain 480mg of sodium or just 24% of the Suggested Dietary Target (SDT).



- Currently only 5 (pasteurised) table olive products - 2 Coles and 3 Woolworths products carry the HSRS symbol –from **2.5 to 3.5 stars**, depending on the product sodium level which range from 900mg to 1500mg/100g;
- The HSRS review final report has: *recommended that changes be made to the HSR Calculator to reduce the upper limit of the sodium table for Categories 1, 1D, 2 and 2D from a maximum of 30 baseline points for sodium content > 8,106mg/100g to a maximum of 30 baseline points for sodium content > 2,700mg/100g;*
- Products impacted by this recommendation, including table olives, would see a decrease in their HSR of between 0.5 to 1.0 stars as a result of this change.

#### **Useful table olive production references:**

- *The Voluntary Industry Standard for Table Olives in Australia RIRDC 12/101* <sup>4</sup>;
- *Table Olive Production Manual (JD Smyth October 2012) RIRDC 12/100*<sup>5</sup>
- *Establishing Protocols and Guidelines for Table Olives processing in Australia’ (RIRDC 2004)*<sup>6</sup>, and a companion publication – *Producing Table Olives* (Landlinks Press 2007)<sup>7</sup>, by Professor Stan Kailis and David Harris provides Australian olive growers and processors with internationally based guidelines for ensuring the quality and safety of processed table olives.
- A simple “how to” guide to processing various styles of table olives by Professor Stan Kailis can be found on the AOA website<sup>8</sup>.
- Olive Growing 5<sup>th</sup> Edition (English Translation) Chapter 18: Processing Olives (pp 647-691) – available for purchase from AOA.

END

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<sup>4</sup> The Voluntary Industry Standard for Table Olives in Australia (NTOC, October 2012) RIRDC 12/111: <https://australianolives.com.au/wp-content/uploads/2018/06/The-Voluntary-Industry-Standard-for-Table-Olives-in-Australia-2012.pdf>

<sup>5</sup> Table Olive Production Manual (JD Smyth October 2012) RIRDC 12/100: <https://australianolives.com.au/wp-content/uploads/2018/06/12-100-Table-Olive-Production-Manual.pdf>

<sup>6</sup> Stanley Kailis and David Harris, Establishing Protocols and Guidelines for Table Olives processing in Australia RIRDC Publication 04/136, October 2004: <https://www.agrifutures.com.au/wp-content/uploads/publications/04-136.pdf>

<sup>7</sup> Stanley Kailis and David Harris, ‘Producing Table Olives’ 2007: <http://www.publish.csiro.au/pid/5466.htm>

<sup>8</sup> How to guide to table olive processing by Stan Kailis: <https://australianolives.com.au/how-to-table-olives/>