

Economic Context for Table Olives In Australia

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Presentation Overview

- **Statistical Summary**
- **Market Considerations**
- **Profitability**

Table Olive Statistics

Australian Production Summary

- **The AOA estimates there are some 125 table olive producers across Australia**
- **Total grove area is around 1,000 hectares,**
- **Production is estimated at 3,000 tonne of fruit per annum.**
- **The Australian is largely a boutique industry, with 80% of table olive producers having less than 5 hectares**
- **There are 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.**

Table Olive Statistics – Global Production

Country ¹	2015/16 (1000s tonne)	2016/17 (1000s tonne)	2017/18 (1000s tonne)	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
(Australia) ²	3.0	3.0	3.0	3.0
World	2,577	2,899	3,284	2,569

¹ International Olive Council- December 2018
 Ref: https://www.internationaloliveoil.org/wp-content/uploads/2019/11/production3_ang.pdf
² Australian Olive Association

Table Olive Statistics – Major Exporters

Country ¹	2015/16 (1000s tonne)	2016/17 (1000s tonne)	2017/18 (1000s tonne)	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) ²	0.208	0.243	0.085	0.080 ³
World	611	652	659	638

¹ International Olive Council- November 2018

Ref:

https://www.internationaloliveoil.org/wp-content/uploads/2019/11/exportations3_ang.pdf

² Australian Horticulture Statistics Handbook (Hort Innovation)

³ Australian table olive exports in 2018-2019 were 80 tonne, with a total value of A\$0.4 million.

2018-19 Australian Horticulture Statistics Handbook (Hort Innovation)

Table Olive Statistics – Major Importers

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

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%.

Table Olive Statistics – Aust Consumption

- Australian apparent consumption of table olives (domestic production plus imports, minus exports) for 2018/19 is estimated at 21,500 tonne or 0.9 kg / person.
- Imported table olives comprise at least 75% of Australian domestic consumption.
- **Is there a potential opportunity for import replacement? Or do we need to create new markets?**

Ref: https://www.internationaloliveoil.org/wp-content/uploads/2019/11/consommation3_ang.pdf

Table Olive Economic Considerations

- Marketing 101
 - Detailed definition of target
 - Competition
 - Pricing
 - Promotion
- Accurate costing
- Labour
 - Picking
 - Sorting
 - Packing
- Packaging
- Consistency

Thank You !

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