

Australian Table Olives - An Overview 2020

Peter McFarlane, AOA OliveCare® Code of Best Practice Administrator and National Table Olive Committee Convenor

Global production of table olives:

The top producers of table olives by country¹ (1000s tonne):

Country	2015/16	2016/17	2017/18	2018/19	2019/20 (provisional)	2020/21 (estimated)
Spain	601	596	562	591	458	590
Turkey	397	401	450	423	414	430
Egypt	336	550	750	600	750	800
Algeria	221	293	304	300	323	310
Greece	194	180	261	199	222	230
Morocco	120	120	130	130	135	130
Syria	150	190	100	110	117	105
Argentina	73	96	106	80	95	80
Peru	56	80	190	124	50	75
Iran	61	76	60	77	93	98
Italy	66	40	60	40	60	50
(Australia) ²	3.0	3.0	3.0	3.0	2.0	2.0
World	2,577	2,900	3,284	2,898	3,058	3,134

¹ International Olive Council (IOC) - November 2020

Ref: <https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#figures>

² Australian Olive Association (AOA)

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 2,000 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. The major olive production states are NSW, SA, WA and VIC. Australian table olive production represents only 0.06% of global production.

Major Exporters of Table Olives:

The top exporters of table olives by country¹ are (1000s tonne):

Country	2015/16	2016/17	2017/18	2018/19	2019/20 (provisional)	2020/2120 (estimated)
Spain	177	177	163	188	173	176
Egypt	56	108	88	60	150	120
Morocco	88	86	90	99	85	95
Greece	73	78	83	75	66	83
Turkey	72	58	77	90	80	80
Argentina	56	62	60	56	55	48
Peru	25	22	25	39	25	25
Portugal	13	13	14	16	16	16
Italy	10	10	11	13	13	14
(Australia) ²	0.22	0.24	0.09	0.08	0.08	0.08
World	611	653	642	672	701	688

¹ International Olive Council (IOC) - November 2020

Ref: <https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#figures>

² Australian Horticulture Statistics Handbook 2018/19 (Hort Innovation)

Australian table olive exports¹ in the 2018-2019 reporting period is estimated at 80 tonne, with a total value of A\$0.4 million, which represents just 0.1% of global table olive exports.

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

Major Importers of Table Olives:

The top importers of table olives by country¹ are (1000s tonne):

Country	2015/16	2016/17	2017/18	2018/19	2019/20 (provisional)	2020/21 (estimated)
USA	154	146	141	172	147	174
Brazil	102	114	110	118	125	125
EU	94	99	114	114	114	109
Canada	30	29	32	33	32	34
Saudi Arabia	26	28	28	27	28	28
Russia	22	25	25	28	29	25
(Australia) ²	17.0	17.6	17.3	18.5	16.3	18.0
World	610	637	642	671	668	688

¹ International Olive Council- November 2020

Ref: <https://www.internationaloliveoil.org/what-we-do/economic-affairs-promotion-unit/#figures>

² IOC Newsletter March 2021

Table olive imports to Australia:

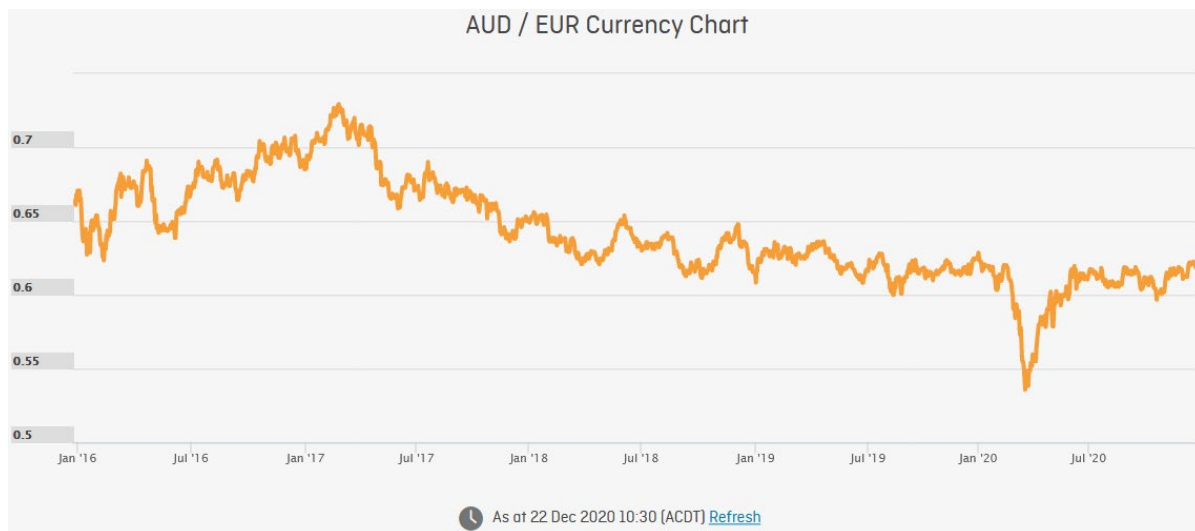
The Australian table olive market stood at around 17 000 t in the last 12 crop years, reaching 16 330 t in 2019/20 (September 2019 - August 2020), around 2.5% of world imports

Table 3 shows imports in the last crop year by country of origin. Among them, Greece stands out as the main supplier with 49.8% of the imported volume (8 129 t). It is followed by Spain with 33.7% (5 497 t); Italy with 7.4% (1 207 t); and Turkey with 3.2% (525 t). The remaining countries are below 3%.

	2016/2017	2017/2018	2018/2019	2019/2020	%Variation Rates
GREECE	10513	10385	9866	8129	↓ -17.6
SPAIN	3891	3861	5841	5497	↓ -5.9
ITALY	1083	932	1158	1207	↑ 4.3
TURKEY	715	770	587	525	↓ -10.7
EGYPT	199	279	356	379	↑ 6.6
SYRIA	45	1	29	130	↑ 348
PERU	166	163	124	129	↑ 3.8
LEBANON	82	99	107	112	↑ 5.3
ARGENTINA	117	123	119	66	↓ -44.9
ISRAEL	42	37	51	52	↑ 0.6
CHILE	0	11	44	45	↑ 2
MOROCCO	681	456	71	28	↓ -60
Others	63	143	134	32	↓ -76.1
Total	17597	17260	18488	16330	↓ -11.7

Table 3 - Imports of table olives by country of origin 2016/17 - 2019/20 (×1000 t)

Australian domestic and export market conditions remain challenging with Australian supermarket shelves dominated by cheap imported olive oil products. However, the Australian Dollar (A\$)² has further depreciated against the euro (EUR) from a high of 0.73 in February 2017 to a fairly stable 0.62 during 2020 (apart from a COVID-19 dip in March 2020!). The lower Australian Dollar serves to make imports more expensive, exports more competitive, 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.

Australian apparent consumption of table olives² (domestic production plus imports, minus exports) for 2018/19 is estimated at 20,500 tonne or 0.9 kg / person, with imported table olives comprising up to 90% of Australian domestic consumption, highlighting the opportunity for import replacement.

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

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