BRAZIL – IMPORTS OF OLIVE OIL AND TABLE OLIVES

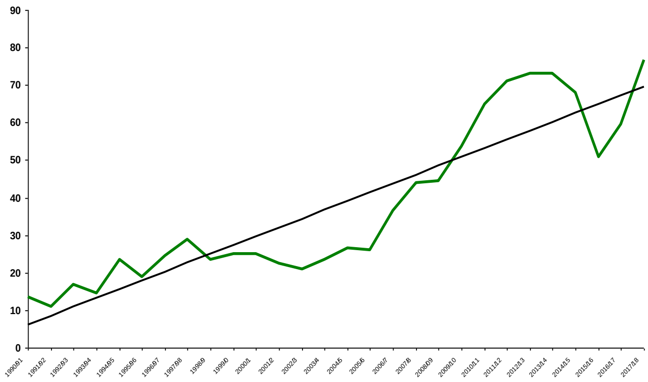
1. Olive oil and olive-pomace oil

Brazilian imports of olive oil and olive-pomace oil have risen by 28% over the course of the 2017/18 crop year, reaching 76 816.6 tonnes compared to the previous crop year and surpassing the average volumes of the last four crop years. As regards the provenance of imports, 82% of the total came from European countries: 59% from Portugal, 16% from Spain, 6% from Italy and 1% from Greece. The remaining 18% came from Argentina (10%), Chile (7%) and other countries (1%). Table 1 shows import trends over the last five crop years. It shows how Portugal, the main exporter to Brazil, maintains not only its leading position in this market, in both absolute and relative values, but also strengthens its section of the market compared to the previous crop year. Imports have risen by 5% during the period given in Table 1. Graph 1 shows Brazilian import trends over the last 20 crop years. We can see a continuous increase up until the 2012/13 crop year, before a light fall linked to the economic crisis and the devaluation of the Brazilian currency. Brazilian imports start to pick up in 2015/16 to reach their peak during the last crop year. The monthly movements of this market are show in Section I.1.

BRAZIL - OLIVE OIL IMPORTS BY SOURCE COUNTRY (INCLUDING ANY OLIVE-POMACE OILS)

Source	2013/14		2014/15		2015/16		2016/17		2016/17	
	t	%	t	%	t	%	t	%	t	%
Portugal	43,072.5	59%	40,915.4	60%	29,033.6	57%	34,208.6	57%	45,183.8	59%
Spain	15,050.8	21%	13,754.3	20%	9,471.3	19%	12,226.2	20%	12,382.4	16%
Argentina	6,654.3	9%	5,357.6	8%	5,207.9	10%	5,379.1	9%	7,594.0	10%
Italy	4,333.5	6%	4,087.0	6%	3,074.5	6%	3,800.0	6%	4,250.4	6%
Chile	3,469.9	5%	2,707.0	4%	3,070.2	6%	3,670.0	6%	5,653.5	7%
Greece	428.5	1%	346.6	1%	435.3	1%	308.7	1%	634.6	1%
Morocco	63.2	0%	65.2	0%	0.2	0%	0.1	0%	0.1	0%
Peru	83.2	0%	62.4	0%		0%	2.2	0%	0.0	0%
Tunisia	11.4	0%	275.4	0%	319.9	1%	401.8	1%	951.1	1%
Lebanon	24.0	0%	8.9	0%	13.7	0%	18.1	0%	11.1	0%
Others	191.0	0%	198.5	0%	22.7	0%	125.2	0%	155.5	0%
TOTAL	**73,382.3**	**100.0%**	**67,778.2**	**100.0%**	**50,649.3**	**100.0%**	**60,139.9**	**100.0%**	**76,816.6**	**100.0%**

Tableau I – Brésil : importations d'huile d'olive par pays d'origine (2013/14-2017/18)



Graphique I - Brésil : importations d'huile d'olive et de grignons d'olive (1990/91 - 2017/18)

Xylella fastidiosa

The IOC held a meeting on 6 and 7 September 2018 with representatives from the International Centre for Advanced Mediterranean Agronomic Studies (French acronym CIHEAM), the Food and Agriculture Organization of the UN (FAO), the International Plant Protection Convention (French acronym CIPV) and the European and Mediterranean Plant Protection Organization (French acronym OEPP) to discuss implementing a joint plan to prevent, control and mitigate the effects of the bacteria *Xylella fastidiosa* (Xf) in olive trees and protect international trade. The joint seminar "Integrated Action against Xylella fastidiosa to Protect Olive Trees and International Trade" organised by the IOC and CIHEAM at Bari (Italy) was announced at this meeting. The seminar will take place between 12 and 14 December 2018 in Bari. Please click here to sign up before 8 December if you wish to attend.

The seminar will address national organisations for plant protection, those responsible for the IOC network of germplasm banks, researchers and institutions working on the bacteria as well as representatives from producers in the main olive oil producer countries. The goal is to open up international channels of communication to discuss the issue and establish a strategy for effective communication to bring transparency and trust for operators, keeping all those involved informed on the progress of the bacteria and the state of recent research and ongoing projects.

The IOC, CIHEAM, FAO, CIPV and OEPP met to draw up a joint plan of action to respond to the needs of operators in the sector, in particular for the trade of olive trees around the world.

One of the tools used to elaborate this plan was the questionnaire presented by Dr Gaetano Ladisa, researcher at the CIHEAM, Bari, at the 52nd meeting of the Advisory Committee of the IOC on 16 October. The questionnaire aims to assess knowledge/perception of the risks and appreciation for the management/reaction to the Xf bacteria by the relevant parties. The results will provide practical suggestions for improving the knowledge/perception relationship. This report will have a direct impact on the willingness to adopt preventative measures for controlling the pathogen.

I. WORLD TRADE IN OLIVE OIL AND TABLE OLIVES

1. OLIVE OIL – 2017/18

Imports in olive oil and olive-pomace oil at the close of the 2017/18 crop year (October 2017 – August 2018) increased by 28% in Brazil, 16% in Canada, 3% in Australia and 2% in the US. They remained stable in Japan. Russia[1] recorded a 1% in the ten months of the crop year. Data from China have not been available since April but the first six months of the year a fall of 8% in imports compared to the same period the previous crop year.

Figures for the EU[2] in the first ten months of the crop year indicate that extra-EU imports increased by 89%, where Tunisia was the main contributor to this rise, and intra-EU acquisitions fell by 5% compared to the same period the previous crop year.

Olive oil imports (including olive-pomace oils) (t)

No	Importing country	October 16	October 17	November 16	November 17	December 16	December 17	January 17	January 18	February 17	February 18
1	Australia	2295.4	2843.6	3529.7	2039.0	2512.7	2016.3	3516.9	1475.0	2376.7	2498.0
2	Brazil	5232.9	5443.7	6844.5	7285.3	7652.5	7275.6	4363.3	6103.4	3930.6	6442.4
3	Canada	3580.2	4313.7	4873.0	3218.8	2883.7	2888.2	3222.4	3993.4	2842.6	3348.0
4	China	4188.8	2722.0	8375.6	3833.4	4928.6	7696.5	2776.8	6113.6	1852.0	859.0
5	Japan	3718.0	4871.0	5987.0	4432.0	3395.0	3946.3	4007.0	4705.3	3034.0	3664.0
6	Russia	2141.1	2254.7	2273.4	2036.0	1745.7	2106.9	1325.9	1783.0	1800.0	1746.5
7	USA	22315.9	27198.7	29150.7	20715.0	21996.1	26836.2	30428.7	25134.8	20021.8	22999.6
8	Extra-EU/27	7774.5	6495.9	8827.0	16739.1	23950.8	25156.9	3177.8	11126.2	9111.2	23024.1
	Intra-EU/27	81875.5	76921.2	93162.0	91723.7	113387.6	95192.9	93291.0	102835.3	118311.2	89279.8
	Total	**133122.3**	**133064.5**	**163022.9**	**152022.3**	**182452.7**	**173115.9**	**146109.8**	**163270.0**	**163280.1**	**153861.4**

No	Importing country	March 17	March 18	April 17	April 18	May17	May 18	June17	June18	July 17	July 18	August 17	August 18
1	Australia	2206.4	2454.3	2225.4	2160.0	2428.2	2826.0	1786.1	3397.0	2701.1	4125.0	2272.0	2903.0
2	Brazil	3930.6	8383.4	5397.1	7079.4	4496.4	6124.1	3971.8	4808.0	4243.8	5776.0	4786.9	5279.0
3	Canada	4200.9	4787.9	3882.6	4243.0	4070.8	3621.0	2720.7	4713.0	2177.6	3324.0	3152.0	5319.0
4	China	2410.9	1338.0	2579.0	nd	3036.7	nd	2335.4	nd	4253.8	nd	5057.3	nd
5	Japan	4328.0	4585.0	4829.0	4466.0	6697.0	5128.0	4813.0	5037.0	5215.2	5462.4	5689.0	5480.0
6	Russia	2354.0	2011.2	2504.4	1995.0	2326.3	2432.0	2442.0	2160.5	1581.0	2318.8	2191.6	nd
7	USA	23209.0	29692.2	33968.4	32556.0	28045.4	28242.0	26623.2	26137.3	26375.6	31724.4	31323.2	27301.0
8	Extra-EU/27	8328.9	23411.7	5755.2	18123.6	6587.2	21339.7	10545.6	15548.7	8455.2	13678.8	7537.0	nd
	Intra-EU/27	109296.6	87091.1	78684.8	81351.2	88686.6	91582.2	89667.1	97838.5	83706.5	92525.4	65323.5	nd
	Total	**160265.3**	**163754.8**	**139825.9**	**151974.2**	**146374.6**	**161295.0**	**144904.9**	**159640.0**	**138709.8**		**127332.5**	

2. TABLE OLIVE – 2017/18

Trade in table olives at the close of the 2017/18 crop year[3] increased by 9% in Canada, but fell by 4% in Brazil, 2% in the US and 2% in Australia compared to the same period the previous crop year.

EU figures[4] during the first ten months of the 2017/18 crop year show a 5% increase in intra-EU acquisitions and 16% in extra-EU acquisitions compared to the same period the previous crop year.

Table Olive Imports (t)

No	Importing country	September16	September17	October 16	October 17	November 16	November 17	December 16	December 17	January 17	January 18	February 17	February 18
1	Australia	1705.0	1501.0	1192.0	1295.0	1943.0	1406.0	1479.0	1336.8	1196.0	1023.0	1144.0	1410.0
2	Brazil	10420.7	7949.2	7994.2	9492.3	10718.4	11115.3	11311.1	11055.2	9330.4	7023.3	8466.5	8780.0
3	Canada	2237.0	2077.0	2225.0	2843.0	3039.0	2539.0	2864.0	2663.6	1790.0	2343.0	1943.0	2297.0
4	USA	13398.0	10237.0	11758.0	11055.0	12898.0	12596.0	10549.0	12469.9	10139.0	9811.0	9256.0	8976.0
5	Extra-EU/27	6570.8	6243.2	6858.6	7304.8	7302.6	8255.4	8074.8	10381.4	8325.0	9647.1	7249.3	9355.6
	Intra-EU/27	24999.2	27039.9	29334.5	32329.3	30830.4	29794.9	27758.6	27305.2	20986.6	24624.0	24319.3	24741.0
	Total	**59330.7**	**55047.3**	**59362.3**	**64319.4**	**66731.4**	**65706.6**	**62036.5**	**65212.0**	**51767.0**	**54471.4**	**52378.1**	**55559.6**

No	Importing country	March 17	March 18	April 17	April 18	May17	May18	June17	June18	July 17	July 18	August 17	August 18
1	Australia	1426.9	1421.0	1452.0	1467.0	2088.0	1797.0	1257.0	1561.0	1394.0	1564.0	1320.0	1479.0
2	Brazil	10043.1	7571.7	7091.6	8902.8	9218.2	8140.0	10592.5	10569.0	9459.7	10508.0	9638.4	8827.0
3	Canada	2170.0	2444.0	2505.0	3044.0	2269.0	2714.0	2539.0	3146.0	2483.0	2525.0	2599.0	2699.0
4	USA	12894.0	11297.0	11852.0	11454.0	12461.0	12953.0	12028.0	12834.0	13143.0	13306.0	15856.0	14220.0
5	Extra-EU/27	9501.1	12533.7	9844.1	11552.4	9657.6	12289.9	9800.7	9262.1	7855.8	nd	7846.0	nd
	Intra-EU/27	28196.3	27031.1	24723.0	28051.3	29038.1	30987.5	30217.1	32831.6	46479.7	nd	25062.2	nd
	Total	**64231.4**	**62298.5**	**57467.7**	**64471.5**	**64731.9**	**68881.4**	**66434.3**	**70203.7**	**80815.2**		**62321.6**	

II. PRODUCER PRICES – OLIVE OILS

Graph 1 tracks the weekly movements of prices paid to producers for extra virgin olive oil in the three main producer countries of the EU and in Tunisia. Graph 3 shows the weekly changes in producer prices for refined olive oil in the three main EU producer countries. Monthly price movements for these categories are given in Graphs 2 and 4.

Extra virgin olive oil: Producer prices in **Spain** fell slightly in the last few weeks, coming in at **€2.62/kg** by **mid-October 2018**, a 30% decrease compared to the same period the previous crop year (Graph 1).

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[1] Data for Russia for August 2018 were not available at the time of publishing this newsletter.

[2] EU data for July 2018 were not available at the time of publishing this newsletter.

[3] According to the new provisions of the International Agreement on Olive Oil and Table Olives, 2015, which came into force on 1 January 2017, "table olive crop year" means the period of twelve months from 1 September of one year to 31 August of the next. Under the 2005 Agreement, the crop year for table olives was the same as that for olive oil (October to September).

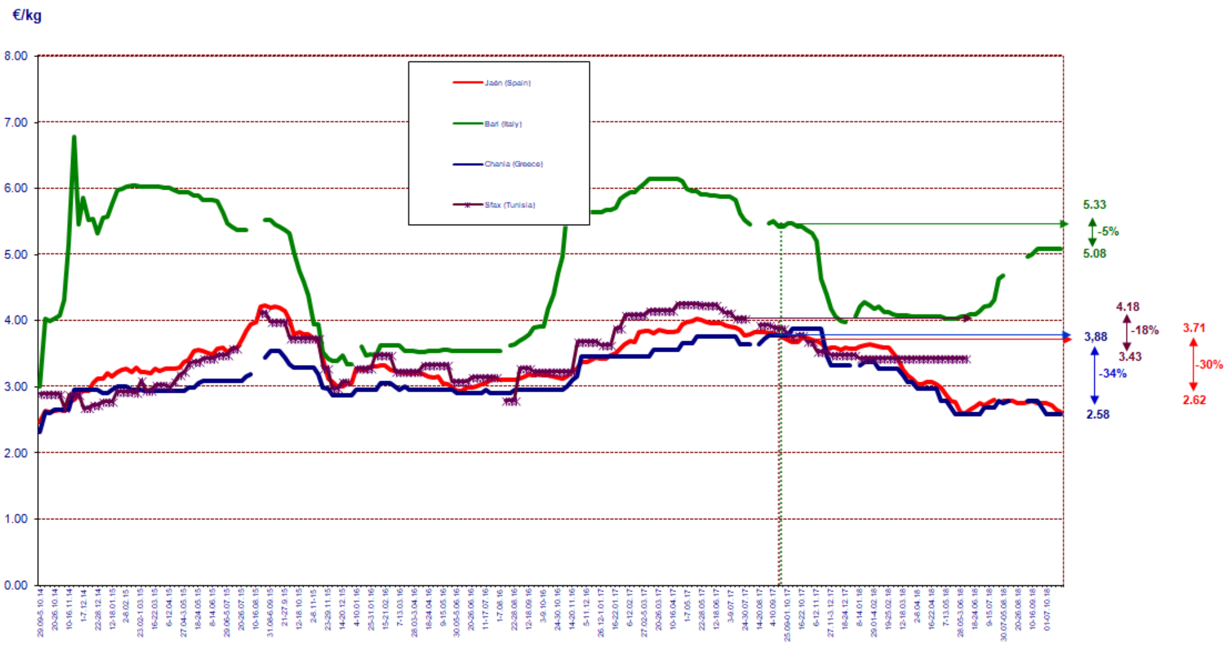
[4] EU data for July 2018 were not available at the time of publishing this newsletter.

Italy: Production prices have passed the €5 mark at the beginning of September 2018, stabilising in recent weeks and coming in at **€5.08/kg** by **mid-October 2018**, a 5% decrease compared to the same period the previous crop year. Graph 2 shows the monthly price movements for extra virgin olive oil over the last two crop years.

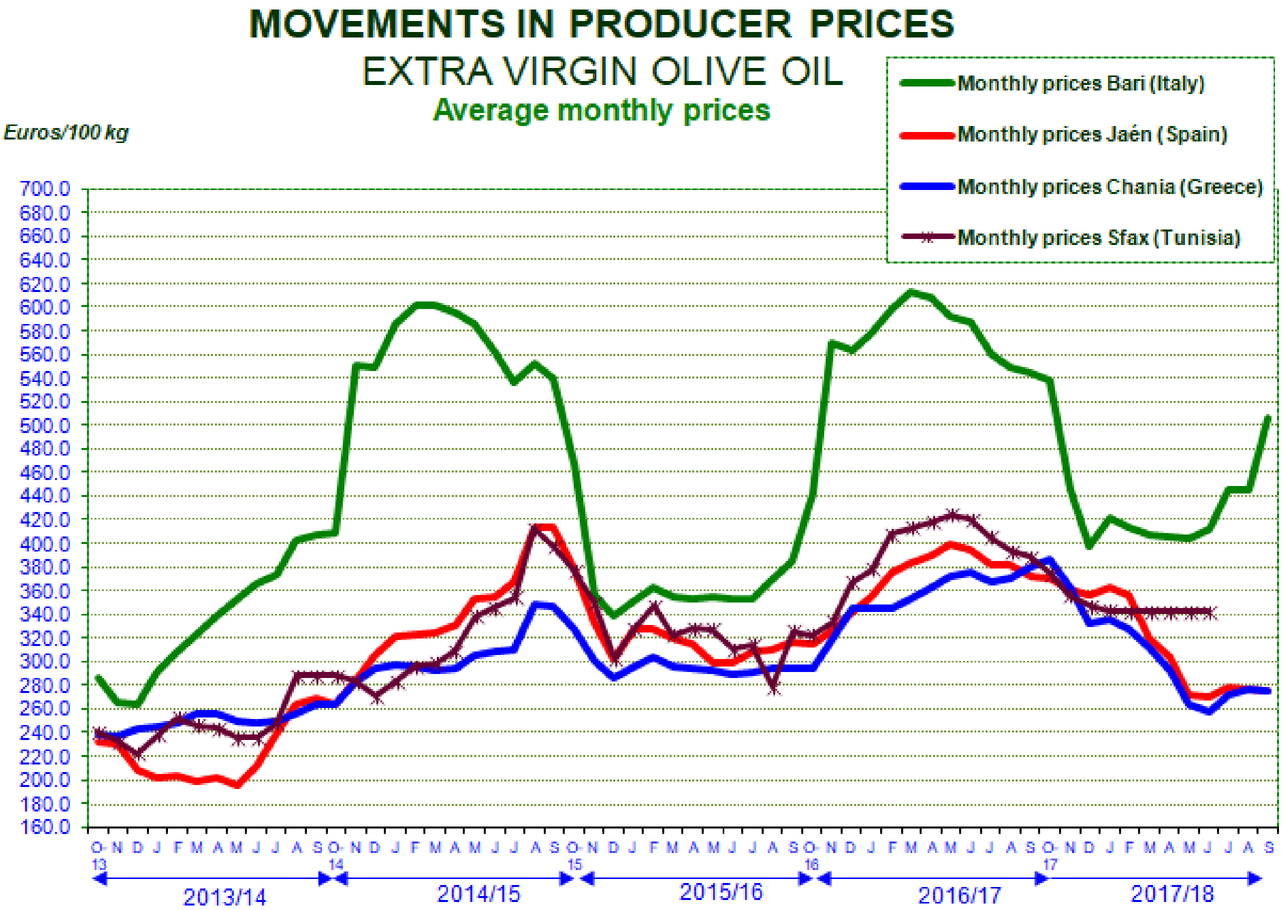
Greece: Prices fell slightly in recent weeks, coming in at **€2.58/kg** by **mid-September 2018**, a 34% decrease compared to the same period the previous crop year.

Tunisia: Prices remained stable in the last weeks of June 2018, reaching **€3.43/kg**, an 18% decrease compared to the same period the previous crop year.

2014/15, 2015/16, 2016/17 & 2017/18 CROP YEARS EXTRA VIRGIN OLIVE OILS
Weekly producer price movements Bari, Chania, Jaen and Sfax markets



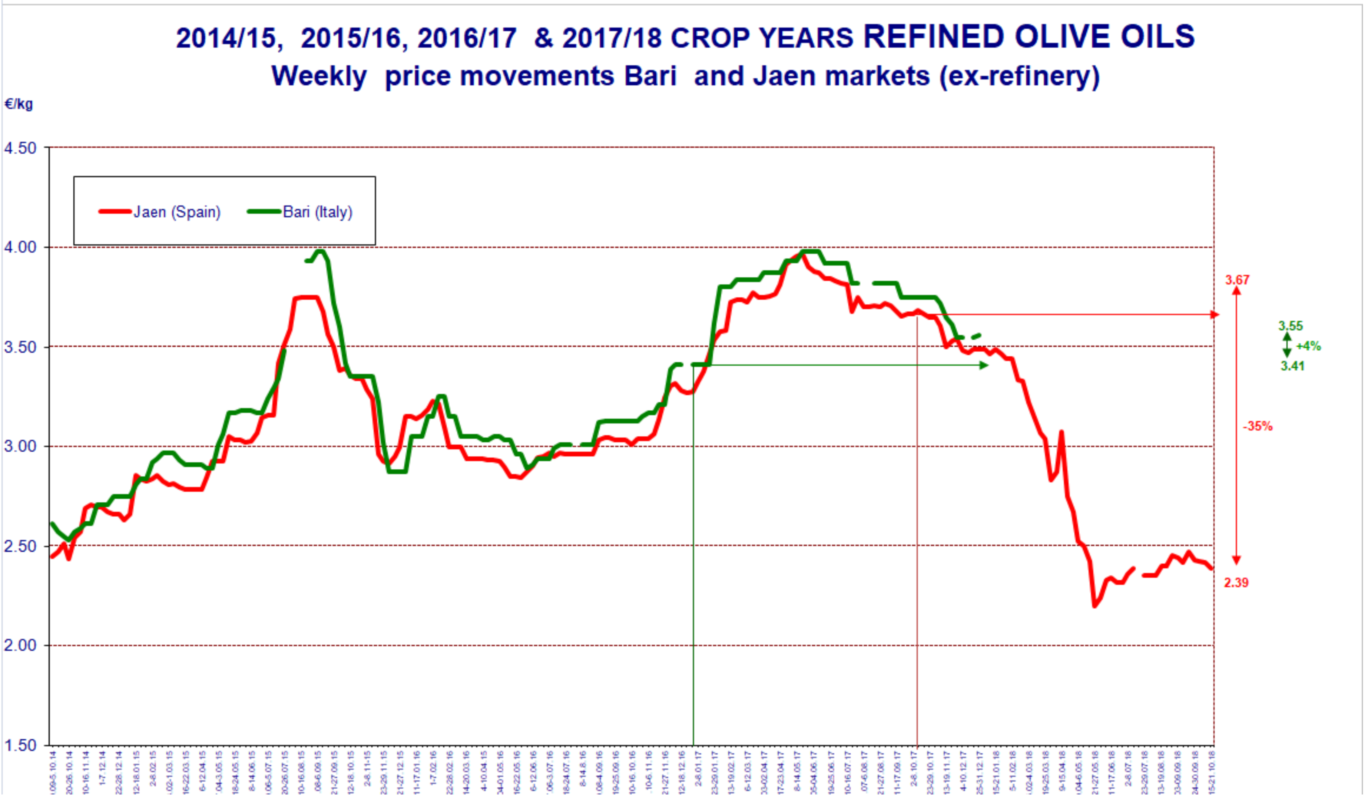
Graph 1



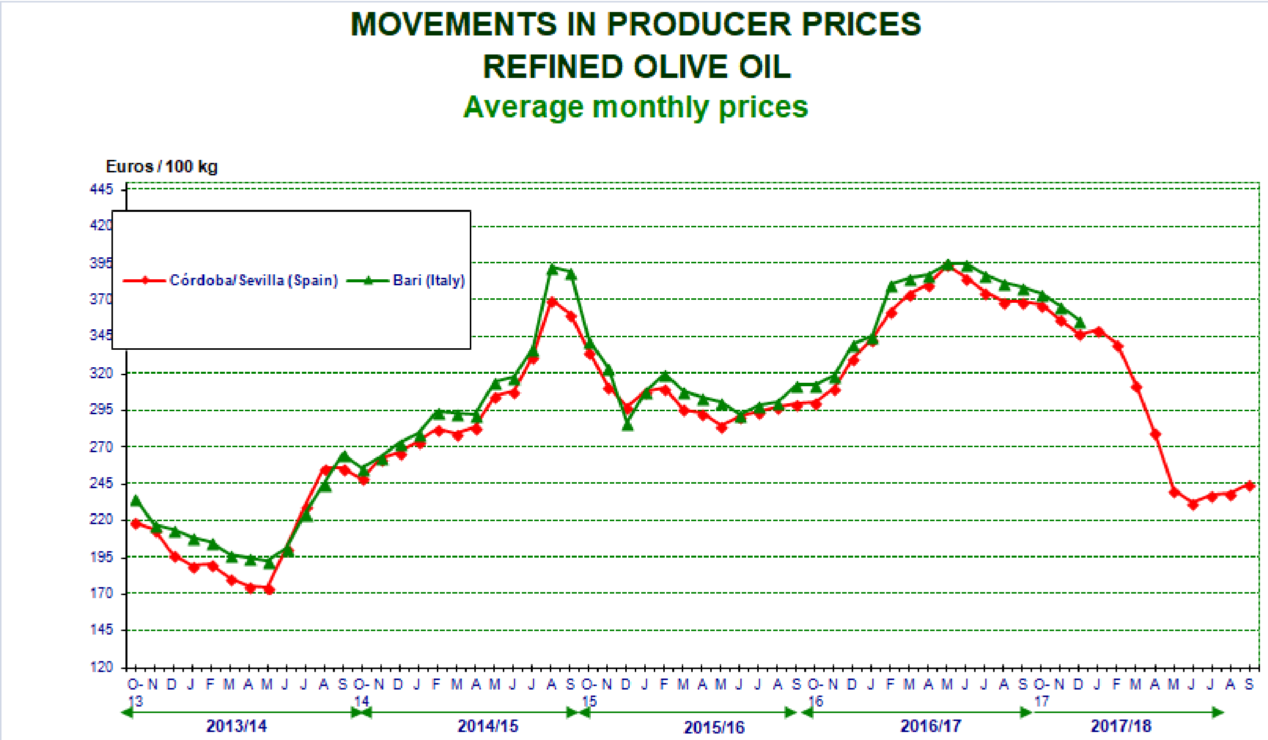
Graph 2

- **Refined olive oil**: Producer prices in **Spain** came in at **€2.39/kg** by **mid-October 2018**, a **35%** decrease compared to the same period the previous crop year. Data for this category have not been available from **Italy** since the end of December 2017, when they reached **€3.55/kg**, a **4%** increase compared to the same period the previous crop year. Data for this category in **Greece** are not available.

  By mid-October 2018, the price difference between refined olive oil (€2.39/kg) and extra virgin olive oil (€2.62/kg) was €0.23/kg in Spain, while it was €0.63/kg in Italy according to data from December 2017 (Graph 3).



Graph 3



Graph 4

Stay tuned!

Keep up with the olive sector through Olive News: http://www.scoop.it/t/olive-news **and the goings on at the IOC:** http://www.linkedin.com/company/international-olive-council

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