

# Entering the European market for table olives

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New table olives exporters that want to enter the European market need to put their products through regular laboratory and sensory tests. You may have a competitive advantage if you can offer table olives with superior sensory characteristics, related to specific production areas, certified organic, or backed by good storytelling marketing. The strongest competitors to new table olive suppliers are currently in Spain, Italy, Greece and Tunisia.

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## 1. What requirements must table olives comply with to be allowed on the European market?

### What are mandatory requirements?

All food products sold in the European Union must be tested for safety, including table olives. Testing for safety includes, for example, complying with established maximum levels for harmful contaminants, such as pesticide residues and heavy metals. In the case of table olives, in addition, product composition is very important, because table olives must meet specific requirements related to processing aids and additives used in brine.

### Tariff barriers

Under certain free-trade agreements, most table olives exporters from developing countries can export table olives to Europe without paying duties. In order to achieve zero duty status, exporters must submit a certificate of origin that complies with specific rules defined in the free-trade agreement between the exporting country and the European Union. Most table olive-producing countries are members of the [Euro-Mediterranean partnership agreement](#), but the EU also has free-trade agreements with Albania, South Africa, Palestine and some South American countries.

In most cases, table olives can be exported to Europe with zero duties but for several countries a duty of 12.8% is applied. This is case for several table olives-producing countries such as Argentina, Australia, Iran, Iraq, Libya, Saudi Arabia, Brazil and United States of America. For Syria, the applied tariff is 8.9%. When a tariff is calculated, it is applied to the value per kilogram of drained net weight.

### Contaminants control in table olives

A specific and frequently updated [European Commission Regulation](#) sets the maximum levels for certain contaminants in food products. In addition to the general contaminant limits set for foodstuffs, it also provides a number of specific contaminant limits for specific products, including table olives.

## Pesticide Residues

The European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticide residues than allowed will be withdrawn from the European market. The European Union regularly publishes [a list of approved pesticides](#) that are authorised for use. Although high levels of pesticide residues are not very common for table olives, some European importers do request a detailed test for the presence of pesticide residues.

According to the [European Food Safety Authority report](#) published in April 2021, olives are among the foods with the lowest level of MRLs in Europe. Still, cases of excessive pesticide residues in table olives occur. Two specific pesticides are a reason for concern. The first is pesticide [Chlorpyrifos](#), which limit is set to 0.01ppm from November 2020. Still, table olives with excessive levels of chlorpyrifos were found in imported table olives during 2021. Another important notice is the ban on the pesticide [dimethoate](#) from 17 July 2020. Suppliers from developing countries must be aware of this ban as dimethoate was frequently used to protect olive trees against the olive fruit fly.

## Microbiological contaminants

The presence of microorganisms must be below certain limits in line with the European regulation on [microbiological criteria for foodstuffs](#), or in line with national legislations of the European Union member countries. Most European buyers will require laboratory analysis for the presence of microbiological contaminants as part of the product specification. Pathogenic bacteria, such as Salmonella or Listeria, must be completely absent. The presence of aerobic bacteria, Escherichia coli, yeasts and moulds can be tolerated in very small quantities.

The presence of microbiological contaminants is rare in table olives, as fermentation and a high salt content prevent the growth of many pathogenic and spoilage microorganisms. However, if good hygiene and manufacturing practices are not followed, microbiological contamination can happen. The most common contamination is the presence of moulds. To prevent sanitary risks and to consistently produce safe table olives, many technologists recommend strict fermentation process control by using starter cultures.

## Heavy metals

The European Union's [regulation on food contaminants](#) sets restrictions for lead, cadmium, mercury and tin. European buyers will commonly require tests on the presence of heavy metals in table olives. For canned food, the maximum allowed tin content is 200 mg/kg. Tin used to be found in canned products as a result of the dissolution of the inside tin coating. However, since tin cans now generally have a different coating there are not many recent alerts of tin found in table olives packaging.

## Chlorate and perchlorate

One of the recent changes in contaminants regulation regards the allowed level of chlorate. It is set at 0.7 mg/kg for table olives. [Legislation on chlorate levels](#) entered into force in June 2020. Chlorate is no longer approved as a pesticide, but it can be found in table olives if chlorinated water is used during processing. Another source may be chlorinated detergents used to clean facilities and processing equipment. Sodium hypochlorite was intensively used to disinfect surfaces during the COVID-19 pandemic in 2020 and 2021, increasing the risk of chlorate contamination.

## Table olives composition

European authorities can reject table olives if they have undeclared or unauthorised materials, or if the levels of these materials are too high. Allowed ingredients and additives in table olives and packing brine are determined by the [Trade Standard on Table Olives](#) of the International Olive Council (IOC) and the [European regulation on food additives](#). The IOC standard defines the following additives: preservatives, acidifying agents, antioxidants, stabilisers, flavouring agents, flavouring enhancers, firming agents, thickeners and agglutinants and processing

aids.

The most often used additives in table olives are acidity regulators such as lactic acid and citric acid. In olives darkened by oxidation the producers use ferrous lactate and ferrous gluconate as stabilisers. The most used type of preservative is potassium sorbate but generally the usage of preservatives in Europe is decreasing due to the clean label trend. Please note that sulphur dioxide is not allowed as a preservative in table olives but there are still cases of imported table olives containing sulphur dioxide.

For stuffed olives, it is important to understand that animal ingredients must be authorised by the EU authorities before they are allowed to enter the market. On the European market there is a wide range of olives stuffed with products such as cheese, anchovies, sardines, fish pastes or ham. In order to export olives stuffed with animal ingredients, the supplying country but also individual processing facilities must be authorised for export to the EU. The [list of authorised facilities](#) can be found on the official EU webpage classified per country and product category.

Addition of colourings to table olives is forbidden. Adding artificial colours to table olives is considered fraud but it is unfortunately quite a common practice as described in several [research reports](#). Several European market inspections found the addition of copper complexes of chlorophylls and chlorophyllins to green olives to maintain stable green colour. Another adulteration discovered is claiming a false origin, for example placing a label Made in Greek or Made in Italy on table olives imported from other destinations.

## Packaging and labelling requirements

Packaging used for table olives must protect the flavour, colour and other quality characteristics of the product. The content of the packaging must correspond with the indicated quantity on the label. For olives packed in brine, the net drained weight shall be declared in the metric system by weight.

In the case of retail packaging, product labelling must comply with the European Union regulation on the [provision of food information to consumers](#).<sup>1</sup> This regulation defines nutrition labelling, origin labelling, allergen labelling and a minimum font size of 1.2 mm. Retail packs must be labelled in a language that can easily be understood by consumers in the European target country, so generally in the country's official language. This explains why European products often carry multiple languages on the label.

In addition to this regulation, since 1 April, all food in retail packs in Europe must be labelled with an [indication of origin](#). For example, if table olives are imported but packed in France, the packaging still needs to indicate the origin of olives. For example, this can be done in the following way: "packaged in France with olives from Spain or Morocco".

Table olives are not on the list of allergens but in some cases, materials used for stuffing can be allergenic and must be indicated on the label. This is for example when the stuffing contains nuts, mustard seeds or ingredients with sulphites (e.g. sulphite-treated garlic or yellow pepper).

Labelling elements of bulk-packed table olives intended for export include lot identification, name and address of the producer, list of ingredients, country of origin, storage instructions, net weight and minimum durability. Lot identification and the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

### Tips:

Follow the [Codes of Hygienic Practices](#) for Low and Acidified Low Acid Canned Foods and for Canned Fruit and Vegetable Products of Codex Alimentarius to prevent sanitary risks when producing table olives. More specifically, follow the [Quality management guide for the table olive industry](#).

Be sure to perform laboratory tests only in [ISO/IEC 17025:2005](#) accredited laboratories.

Train employees in your company to perform in-company sensory tests for the regular monitoring of table olives quality. Follow the [International Olives Council Guidelines and methods](#) for sensory assessors.

To be prepared for potential new changes in the MRLs, read the [Ongoing Reviews of MRLs in the European Union](#).

Read our study about [buyer requirements for processed fruit and vegetables](#) for a general overview of buyer requirements in Europe.

## What additional requirements do buyers often have?

In addition to the mandatory requirements, many other specific buyer requests have become equally important. These include compliance with food safety, quality and sustainability standards.

### Quality requirements

The European Union legislation does not officially define the quality of table olives. The basic quality categories are determined by the IOC. According to [IOC standards](#), table olives are classified into 3 quality categories based on the number of defects in a sample of 200 olives. The highest quality category (“extra” or “fancy”), must, in addition to a maximum number of defects, also have olives which are larger than 321/350 calibre. In addition to basic quality categorisation, the industry uses several other quality parameters such as:

- Olive flesh/pit ratio – Importers are commonly more interested in olives with small pits and more flesh. Those characteristics are not easy to influence as they are determined by the genetics of the olive variety.
- Separation of pits from the flesh - Easy separation of pits from the flesh in whole olives is a positive quality attribute.
- Olive variety – Some types of olive varieties commonly fetch a higher price on the market. This is usually the case with specific varieties with protected designations of origin which are grown in small areas.
- Sensory characteristics – although sensory characteristics such as taste or smell are qualitative and subjective, organoleptic quality can be measured through officially recognised tests and certified tasters. Appearance, texture, smell and taste are assessed on tests. Quality olives should have a clean acceptable aroma without foreign odours and a degree of crunchiness and firmness in the flesh. The taste should be balanced between the natural flavour, lactic acid and the added salt and marinade.

### Food safety certification

Although food safety certification is not obligatory under European legislation, it has become a must for almost all European food importers. Most established European importers will not work with you if you cannot provide some type of food safety certification.

Most European buyers will ask for a [Global Food Safety Initiative](#) (GFSI) recognised certification. For table olives, the most popular certification programmes recognised by GFSI are:

- [International Featured Standards](#) (IFS)
- [British Retail Consortium Global Standards](#) (BRCGS)
- [Food Safety System Certification](#) (FSSC 22000)

Please note that this list is not exhaustive and food certification systems are constantly developing.

Although the various food safety certification systems are based on similar principles, some buyers prefer one specific standard over the other. For example, British buyers often require BRCGS, while IFS is more common for German and French retailers. Also note that food safety certification is usually not all you’ll need to start exporting to Europe. Serious buyers will usually visit or audit your production facilities before buying.

## Packaging requests

The type of packaging for table olives depends on the market segment covered by the importer. If olives are packed directly in retail packaging for retail chains' private labels, producers will receive precise packaging specifications including materials, dimension and type of the packaging, and labelling design. The most popular type of packaging is glass jars, followed by tin cans. With the popularity of snacking olives, vacuum bags and pouches are also increasingly used. Bulk packaging usually uses barrels.

Food service suppliers will request packaging sizes of 2-10 kg which may include cans, jars or plastic buckets. Retail and foodservice containers are packed in cartons and then on pallets. One of the main trends in Europe is decreasing the use of non-recyclable packaging so producers can expect increasing requests for sustainable packaging materials.

## Private safety and sustainability requests

Although most European retailers will support the certification schemes listed above, many of them will have additional requirements. Many supermarket chains will contractually oblige suppliers to meet comprehensive quality assurance requirements, including unannounced inspections at processing facilities.

One of the more recent trends is to ask for laboratory tests to prove that the presence specific pesticide residues stays well below the legally allowed limit. Some buyers may provide a list of pesticides and a specific integrated pest management programme that must be followed if you want to do business with them.

Many importers will ask you to follow their own specific code of conduct. Most European retailers, such as [Lidl](#), [Rewe](#), [Carrefour](#), [Tesco](#) and [Ahold Delhaize](#), have their own codes of conduct.

### Tips:

Get food safety certification. Carefully select a certifying company and consult with your preferred buyers about their certification preferences.

Do a self-assessment using the producer starter kit on the [Amfori BSCI website](#).

## What are the requirements for niche markets?

### Organic table olives

Organic certification schemes are increasingly popular in Europe. Although organic production was until recently reserved for niche markets, organic products are now becoming more mainstream. However, certain types of organic certification such as 'biodynamic' ([Demeter](#) or [BDA](#)) can still be considered niche requirements.

To market table olives as organic in Europe, they must be grown using organic production methods as defined by [European legislation](#). An important aspect of organic olive production is debittering. The EU legislation on organic production restricts the use of food additives and processing aids. This means that debittering with lye is not allowed in the production of table olives. Organic table olives can be produced only through natural fermentation methods such as salt solution or/and water rinsing. The usage of preservatives (benzoic or sorbic acid) is not allowed in organic olives either.

Growing and processing facilities must be audited by an accredited certifier before you are allowed to use the European Union's organic logo on your products. The same goes for use of the logo of certifying organisations, such as the [Soil Association](#) in the United Kingdom and [Naturland](#) in Germany.

Importing organic products into Europe is only possible with an [electronic certificate](#) of inspection (e-COI). Each batch of organic products imported into the European Union has to be accompanied by an electronic certificate of inspection as defined in the regulation [covering imports of organic products from third countries](#). This electronic certificate of inspection must be generated via the [Trade Control and Expert System](#) (TRACES).

Be aware that the [new EU regulation on organic production](#) is expected to enter into force in 2022. The new rules will allow for mixed farming and combined conventional and organic production, provided that the two are sufficiently separated.

## Sustainability and Corporate Social Responsibility (CSR) certification

Sustainability is a broad term with many aspects and there is still no recognised sustainability certification that covers all of them. Until recently, sustainability certification was aimed at special niche buyers on the market but now it is becoming a mainstream request, similar to organic certification. One increasingly used aspect is to publish CO2 emission rates on products, but it is difficult to get reliable measurements for those claims. However, some private certification schemes to do this are in development. Currently, the most famous certification schemes focus on environmental impact and ethical (CSR) aspects.

Companies have different requirements for corporate social responsibility. Some companies require adherence to their code of conduct, or one or more of the common standards, such as the Supplier Ethical Data Exchange ([SEDEX](#)), Ethical Trading Initiative ([ETI](#)), and Business Social Compliance Initiative code of conduct ([BSCI](#)).

[Fairtrade](#) and [Rainforest Alliance](#), although widely recognised certification schemes, are not very frequently used for the certification of table olives. Fairtrade International has developed a specific standard for [oleaginous fruit](#), including olives. Currently there are four Fairtrade-certified table olives producers/processors in Palestine and one in Morocco. Fairtrade standards define the minimum and premium price for olives, specifically for Northern Africa, South America, Western Asia and the Middle East.

## Ethnic certification

Islamic dietary laws (Halal) and Jewish dietary laws (Kosher) propose specific restrictions in diets. If you want to focus on the Jewish or Islamic ethnic niche markets, consider implementing [Halal](#) or [Kosher](#) certification schemes.

### Tips:

Read our study on [trends in the European processed fruit and vegetables market](#) for an overview of developments regarding sustainability initiatives in the European market.

Consult the [Standards Map](#) database for information on a wide range of sustainability labels and standards.

Check the [guidelines for imports of organic products into the European Union](#) to familiarise yourself with the requirements of the European organic market.

## 2. Through what channels can you get table olives on the European market?

### How is the end market segmented?

There is no exact data, but the foodservice segment was roughly estimated to consume slightly more olives

than retail segment (50-60% depending on the market) before the COVID-19 pandemic. The market share of the retail sales is increasing, especially after the COVID-19 pandemic in 2020 and 2021. Within the retail segment, the largest volumes are sold through supermarkets, where the share of private labels is growing.

Figure 1: End market segments for table olives in Europe



Source: [Autentika Global](#)

## Foodservice

The food service segment is usually supplied by specialised wholesalers and distributors. It usually does not import directly, except in a few cases of fast-food chains which are served by exclusive distributors. Increasing consumption is specifically relevant for Mediterranean-style restaurants and fast-food chains, such as pizza and tapas bars.

The food service segment is quite significant in Europe, in terms of its use of table olives. For example, the Netherlands alone has approximately 40 thousand players in the food service segment. In order to reach final buyers in this segment, it is necessary to use specialised distributors and specific packaging, such as 2-10 kg cans or plastic buckets. Also, companies willing to serve the foodservice segment should have processing equipment for slicing and stuffing olives according to customer needs.

In the restaurant sub-segment, the largest users of table olives are pizza restaurants. Home delivery increased strongly during the COVID-19 pandemic in the whole of Europe, with pizzas being the most ordered dish. Italy is the largest consumer of pizzas in Europe followed by Germany, the UK and France. Sliced olives are the most used olive style for toppings on pizzas, but other types are used too.

Table olives in restaurants are used as an ingredient in wide variety of dishes, as appetizers and even as a common part of cocktail drinks. The general popularity of Mediterranean-style restaurants contributes to table olives consumption. Apart from pizza restaurants, table olives are regular ingredient in Italian, Greek, Spanish, North-African and Middle-Eastern types of restaurants. Germany is the largest market for Middle-Eastern restaurants, followed by the UK.

## Retail

Supermarkets and hypermarkets account for the largest share of retail sales of table olives in Europe. In most cases, private labels of leading retail chains are supplied directly by producers in developing countries. Producing and packing private labels for European retail chains is very challenging as it includes subcontracting through tendering procedures. In addition to private labels, retail chains also import branded products, but usually through specialised distributors or bulk-packed olives for sale in fresh corners. Online retail sales of table olives are growing, especially after the COVID-19 pandemic.

Several types of sub-segments (points of sale) of the table olives retail segment in Europe include the following:

- Retail chains – Among the leading mainstream retailers, the main development is the increasing share of private-label table olives. This also includes organic olives. Companies holding the largest market shares in Europe include Schwartz Gruppe (Lidl and Kaufland brands), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché and Ahold (Delhaize, Albert Heijn and several other brands).
- Specialised ethnic retail – The most relevant types of ethnic shops for table olives sales are shops selling food from Turkey, the Middle East and North Africa. The Turkish retail segment is especially strong in Turkey with ethnic supermarkets such as [Marmara](#), [Eurogida](#), [Özgida](#) or [Aima](#). Examples of other retailers selling table olives from different origins include [Tema](#), [Gima](#), [Aytac](#) (Turkish), [AH Empire](#) (Morrocan), [Lebanos](#)

(Lebanon), and [Sama](#) (Syria).

- Specialised olive and olive oils shops – Specialised shops are often related to products from certain origins. They represent a very small share of the table olive market. Some shops are specialised in olive oil sales, but in addition to oil, also offer a range of table olives. Examples include [Oil & Vinegar](#) and [Oliviers&Co](#).
- Specialised 'fine food' shops – These shops sell a wider range of food and premium table olives. Some specialised shops are part of luxury food department stores like [Fortnum & Mason](#) in the United Kingdom. Fine food stores are sometimes present not as individually branded shops, but as food corners in shopping malls or in luxury department stores, such as [La Grande Épicerie](#) in France and [De Bijenkorf](#) in the Netherlands.
- Specialised organic and health food shops – Specifically relevant for suppliers of organic certified table olives. Many organic shops are part of specialised organic food retail chains, especially in Germany. Some of them import directly.
- Online retail – Online retail is currently dominated by the leading retail chains. Specialised online retailers selling food online only are still rare with the UK based [Ocado](#) being the most notable exception. Some specialised importers offer olives online, but they are often connected to certain origins such as the German company [Lakudia](#) (Greek olives) or the UK company [Olive Store](#) (Spanish olives). One example of specialised online sales is the Italian project [Oli e Olive](#). The online platform was created to enable restaurants to directly purchase table olives from Italian producers.
- Street markets – Although the market share of street markets has decreased significantly over the last decade, street markets are still a popular place for food shopping in Europe. Table olives are often sold at weekly markets by specialised sellers who produce and offer a wide range of tastes. Across Europe, street markets are operational on certain days in a week and sellers often move from city to city to offer their products. At street markets, table olives are commonly sold in bulk.

## Food industry

Most food industry processors purchase table olives from local distributors and rarely import. The biggest users of table olives in the European food industry include:

- Ready meals – Similarly to the foodservice segment, producers of frozen pizza are significant users of table olives. Other products include Mediterranean style products, such as pastas, paella, salads etc. Due to the convenience trend, Mediterranean style ready meals are increasingly produced by specialised companies and sold as fresh in refrigerated corners of supermarkets. Some of the fresh salad producers are also importers of table olives (e.g. [Feinkost Dittmann](#) in Germany).
- Spreads – The most famous spread made from olives is tapenade, and it is produced in many European countries. Different tapenade spreads are produced as private labels for retail chains with a wide range of ingredients. Some tapenades are produced directly in olive-producing countries and imported, while some are produced from imported table olives.
- Other – Olives are used in several other products too. Examples are Tomato Olive Sauces (by [Barilla](#) or [Mutti](#)). The popularity of the vegetarian diet led to many new product launches, some of them using table olives as ingredients (e.g. hummus or tofu).

### Tips:

Study the exhibitor lists of large trade fairs such as [ANUGA](#), [SIAL](#) and [Alimentaria](#) to find potential buyers for your table olives. If you aim to supply supermarket private labels, search for opportunities at [PLMA](#).

In order to more easily reach the food service segment, look for suppliers at specialised food service events, such as [SIRHA](#) and [Internorga](#).

If you are producing premium table olives, enter your product in international competitions to attract potential buyers. Consider also exhibiting at specialised fine food exhibitions, such as [the International Food & Drink Event](#) and [Speciality Fine Food Fair](#).



## Through what channels do table olives end up on the end-market?

In terms of volume, the most important channel for table olives in Europe are large producing and bottling companies. They import bulk table olives for blending and production of their own retail brands. However, independent specialised table olives importers are also an important channel, especially for companies willing to enter high-end segments on the European market.

Figure 2: European market channels for table olives



Source: [Autentika Global](#)

### Importers of the bulk product

Several European companies have developed a strong market presence with their own brands in Europe. These companies import table olives in bulk packaging from selected suppliers. After imports, these companies can either trade olives without further transformation or repack them. If they repack the olives, they may process them, including by using different stuffing and marinades. Many established brands do not supply the market with table olives only, but with a wide range of pickled vegetables.

For new suppliers, the challenge is to establish long-term relationships with leading brands, which usually already work with selected suppliers. Well-known importers perform regular audits and visits to producing countries. As a new contact, at the start of the relationship, you often need to offer the same quality as your competitors but at better prices. On the other hand, they may be interested in a new type of table olives to broaden the range of their offer.

### Importers of the packed product

Importers of the packed product can be specialised traders or even retailers who import directly. Large retail chains usually have centralised purchasing and they select suppliers during annual tenders. In order to supply retail chains, suppliers must be competitive on price and quality, and must have sufficient production capacity. Another opportunity is to sell packed products through ethnic supermarket chains. Larger ethnic supermarket chains (such as certain Turkish supermarkets in Germany) are supplied directly, but most of the individual stores buy products from specialised ethnic importers.

Distributors of brands from producing countries make up another type of importers. These importers are experienced in supplying retail chains and provide good opportunities for unexperienced suppliers. However, it is not easy to start working with these importers as your brand may be a competitor for brands that they already represent.

### What is the most interesting channel for you?

Specialised importers are the best contacts for exporting table olives to the European market, particularly for new suppliers wanting to reach the retail segment more easily. However, selling table olives in mainstream supermarkets can be very difficult and requires high production, distribution and logistics capacities.

Specialised importers usually have a good knowledge of the European market and monitor the situation in table olive producing countries closely. If your company is certified for socially responsible practices or produces certified organic table olives, you can look for opportunities with specialised importers of these products.

There is no recipe for entering the European retail market, so the best advice is to learn from other producers in

your country. Generally, before exporting, you should develop a presence on your own market to understand the general retailer requests and the business environment. When you find a suitable distributor or make contacts with retailers in Europe, you should try to participate in a procurement process and get a one-year contract. If this proves to be too challenging, a distributor can try to list your product during a promotional week. If sales appear to be successful, this could lead to a longer contract.

### **Tip:**

Understand the retailers' demand for sustainable products and make yourself more competitive by investing in different certification schemes, such as those involving corporate social responsibility (CSR) practices. Food safety certification is a minimum requirement if you want to enter the retail segment.

## **3. What competition do you face on the European table olives market?**

### **Where are your competitors located?**

The main competitors for emerging table olive suppliers are in Europe, namely in Spain and Greece. Exports from those two countries supply more than 70% of all European table olive imports. The leading non-European suppliers are Morocco, Turkey and Egypt. Italy, although ranked as the sixth exporter, imports more quantities than it exports. Aside from leading table olive producers, there are emerging suppliers on the European market such as Argentina, Syria, Lebanon, Tunisia, Peru, Chile, Algeria, Jordan and Israel.

### **Spain, the leading world supplier of table olives**

Spain is the leading producer of table olives in the world and the largest supplier to other European countries. Over the past five years, Spanish exports of table olives decreased at an annual rate of 1% and reached 462 thousand tonnes in 2020. The reason for the export decrease was lower production, especially during the 2019/2020 season when production was 130 thousand tonnes smaller than in the previous season. Another reason was the tariff imposed by the USA on olives imported from Spain.

The largest market for Spanish table olives is the USA with a 16% share in 2020, followed by Italy (11%), France (9%) and the Russian Federation (7%). The average export price of Spanish table olives is much higher in the USA compared to other destinations. This is because stuffed and other value-added table olives make up the biggest share of exports to the USA. For example, in 2020, 54% of the table olives imported by the USA from Spain were stuffed. Over the past 2 years, Spanish exporters have faced difficulties exporting to the USA because of the 25% tariff imposed on green olives and the 35% tariff imposed on black olives as a result of the "trade war" between the EU and the USA.

Spain's local consumption of table olives is the highest in Europe, amounting to more than 180 thousand tonnes. Due to this high local consumption, Spanish production of olives is not sufficient to satisfy the market demand. As such, Spain also processes some olives from imports. In 2020, Spain imported 36.5 thousand tonnes of provisionally preserved olives, 6.8 thousand olives preserved by vinegar or acetic acid, and 5.5 thousand tonnes of fresh olives. Those quantities were mostly imported from Portugal, Morocco and Egypt.

Having the largest planted area of olive trees in the world, Spain accounts for 50% of the total olive area in Europe. Around 7% (190 thousand hectares) of this area is dedicated to the production of table olives with the remainder used for olive oil production. Most olives used for table olives production is grown in Andalusia (87%),

followed by Extremadura (11%). In Spain, nearly 60% of table olives is produced as green, but in exports, the share of green and black olives is nearly equal.

The main table olive varieties in Spain are Hojiblanca (50%) and Manzanilla (32%). Manzanilla is mostly produced as green while Hojiblanca is processed in different stages of ripeness. Manzanilla is the most consumed variety domestically, while Hojiblanca is the most exported variety. During the 2020/2021 season, the Hojiblanca variety made up 65% of Spanish exports, followed by Manzanilla (25%), Gordal (5%) and Cacereña (4%).

Spain has approved a PDO for olives [Aloreña de Málaga](#) (a green seasoned olive of the Aloreña variety) and [de Mallorca](#) (three types of olives from the native Majorcan variety). Approval for geographical recognition is underway for [Gordal de Sevilla](#) (olives of the Gordal variety) and [Manzanilla de Sevilla](#).

## Greece, the home of Kalamata

Greece is the second-largest producer and exporter of table olives in Europe. Over the last five years, exports of table olives increased at an annual rate of 6% and reached 193 thousand tonnes in 2020, valued at €475 million. Greece processed mostly locally produced olives but also imported 14 thousand tonnes from other countries, mostly from Albania. The USA is the main export market for Greek olives accounting for a 19% share of exports, followed by Germany (10%), Italy (10%) and Romania (8%).

The average export price of Greek olives is considerably higher than the export price for Spanish olives. In 2020, the average export unit value of Spanish table olives was €1.44/kg while the price of Greek olives was €2.46/kg. There are a few reasons for this price difference. Firstly, Greek exports a significant share of naturally fermented kalamata olives which have good image and fetch a higher selling price than other olives. Secondly, Greece is a strong exporter of organic olives (60 thousand tonnes annually) which have a higher export price. Finally, Greek exports a larger share of retail packed olives than Spain, which also contributes to the price difference.

In 2020, Greek production of table olives reached 230 thousand tonnes. Around 85% of domestic production is intended for export. The table olives sector in Greece includes more than 64 thousand farmers and more than 100 processing, packing and trade facilities. The main varieties used for processing into table olives are Halkidiki (40% share), Konservolia (30%) and Kalamata (25%). Halkidiki is mainly processed in Northern Greece; Konservolia in Central Greece; and Kalamata in the prefectures of Aetolia-Acarnania, Laconia and Phthiotis.

Halkidiki is processed as green and 70% of the harvest is pitted. The Kalamata variety is dark brown while Konservolia is processed either as green or black and is also used in olive oil production. In Greece, around 50% of olives are produced using natural fermentation, 40% are processed using an alkaline treatment (Spanish style), and 3% are processed as dry salted. Greece has 10 PDO table olives; six of them of the Konservolia variety ([Amfisis](#), [Artasd](#), [Atalantis](#), [Piliou Volou](#), [Rovion](#) and [Stylidas](#)), three of the Throumpa variety ([Ampadias Rethymnis Kritis](#), [Chiou](#) and [Thassou](#)), and one of the Kalamata variety ([Elia Kalamatas](#)).

The Kalamata olive is the most famous variety in export markets and is prized for its taste. Due to Kalamata's popularity, new orchards are planted continuously. It is forecasted that the production of Kalamata will increase to 100 thousand tonnes in the next 10 years. The Kalamata olive is not a single variety; it is produced from several varieties combined. Kalamata olives are mostly processed using natural fermentation. In order to maintain quality and improve production, the [Elia Olive Quality Center](#) was established which is specifically dedicated to Kalamata olives.

## Morocco, French-focused export

Morocco is the third-largest exporter of table olives in the world, after Spain and Greece. Production reached 130 thousand tonnes in 2020. Around 70% of produced olives are exported while the remaining 30% are consumed locally. In 2020, Morocco exported 89 thousand tonnes of table olives. France was the largest destination market with a 38% share, followed by the USA (21%), Belgium (13%) and Spain (8%). Within Europe,

exports to France, Belgium, Spain and Italy account for 95% of all Moroccan table olives export. The main reason for the significant quantities exported to France are the large investments by French companies in the production of table olives in Morocco.

In Morocco, 90% of olive plantations consist of a single variety – Moroccan Picholine – followed by the Dahbia variety. To solve the problems caused by single-variety cultivation, the [National Institute for Agricultural Research](#) selected several high-performing clones of Moroccan Picholine and two of these (Haouzia and Menara) are now increasingly being grown. With the increase of olive growing, new varieties are also being introduced, such as Beldi.

## **Turkey, established in Germany and focusing on Romania**

Turkey exported 50 thousand tonnes of table olives in 2020. Europe was the main destination market with an 86% share, followed by Iraq and the USA. Within Europe, Romania is the largest market for Turkish olives accounting for a 32% share, followed by Germany (22%), Belgium (16%) and Bulgaria (16%). Germany is an already established market for Turkish olive suppliers thanks to the presence of a large number of ethnic Turkish shops and supermarkets.

Romania and Belgium are two markets with the most significant export increase for Turkish olives. Since 2016, Turkish exports to Romania increased by nearly 6 thousand tonnes, reaching 13.8 tonnes in 2020. The reason for the significant export increase is the presence of Turkish companies in Romania that have invested in subsidiaries and exclusive distributors to gain market share. Two notable examples of Turkish companies in Romania are the [Saha Group](#) (with distribution of the [Defne brand](#)) and [Zayko Tarim](#) (with distribution of the Loras brand).

After Egypt, Turkey is the world's leading consumer of table olives. Most of the olives produced in Turkey are consumed locally and around 15% is exported. More than half of all olive production happens in the Aegean Region, with the remainder produced in Marmara, the Mediterranean Region and south-eastern Anatolia. About 40% of the harvested olives are used for the production of table olives and the remainder is used to produce olive oil. The main varieties used in the production of table olives are Gemlik, Memeli, Memecik, Edremit, Ayvalık, and Domat. Around 70-80% of Turkish table olives are generally produced as black and 20%-30% as green or turning colour.

The main process used for black olive production in Turkey is the Gemlik style, while an alkaline treatment is used for green olives. The Gemlik style uses natural fermentation, but it is different from the Greek style where olives are placed in brine solution. In the Gemlik style, olives and salt are placed into the tanks in alternating layers. After that, heavy weights are loaded on top of the tanks of olives to add pressure. Then the tank is filled with drinkable water. Gemlik olives have a hard skin and this direct contact with salt makes it easy for salt to penetrate the olive fruit while also preventing too much softening of the olives.

## **Egypt, the world's largest producer**

Egypt is continuously increasing its table olive production, reaching 700 thousand tonnes in 2020. Most of the olives grown in the country are intended for consumption as table olives and only around 10% is processed into olive oil. Most of what is produced is consumed locally, while 50-60 thousand tonnes are exported. The leading market for Egyptian table olives is Brazil, with a 35% export share, followed by Spain (22%), Libya (7%) and the USA (5%).

In 2020, Egypt exported 28.3 thousand tonnes to Europe. Spain was the largest destination market with a 54% share, followed by Romania (15%), Italy (12%), France (8%) and Greece (6%). Quantities exported to Spain and Greece are used to supplement domestic production in those countries.

For black table olives, the most common method in Egypt is to pick the fruits when they turn purple, brown, or black, and then keep them in a 10% brine solution together with acid and alkali solutions. For green olives, the

Spanish style (alkaline treatment) of processing is used. The most important olive varieties grown in Egypt are Toffahi, Aggezi Shami, Aksai, Maraki and Siwee. A number of foreign varieties is also grown in Egypt, including Kalamata, Dolci, Picual and Manzanilla.

## **Albania, focused on Greece**

The export of table olives from Albania is continuously increasing and reached 10 thousand tonnes in 2020. Interestingly, all quantities are exported to Greece. Albania has not yet managed to diversify its export to other European markets. Table olives exported to Greece are bulk packed and used to supplement domestic Greek production. The main olive variety is the green “Kokerrmadh Berati.

## **Which companies are you competing with?**

Many olive growers, grower cooperatives, processing facilities, packing companies and exporters supply to European markets, each of them with their own export strategies. The strongest competition is found inside Europe, mainly in Spain and Greece which both have large numbers of exporters. Some of the leading exporters are listed in the examples below, but many other potential competitors are not mentioned in this study because there are so many.

## **Spain**

Table olive exporters in Spain are supported by the [Association of Exporters and Producers of Table Olives](#) (ASEMESA). The export of table olives is constantly promoted by the [Interprofessional Organisation of Table Olives](#) (interaceituna). Interaceituna carries out promotional campaigns in different target markets. This included developing websites specifically for [the UK](#), [India](#), [France](#), [Russia](#), [Canada](#) and the [USA](#). Other promotional activities include the engagement of celebrity chefs, cooking demonstrations, articles in lifestyle magazines etc.

According to the Spanish Food Information and Control Agency, 416 facilities produced table olives in Spain in 2020. In addition, 260 facilities pack table olives with around 40% of those located in Andalusia while the others are located in different parts of Spain. Spanish companies are export-oriented with many engaged in export activities. There are no exact numbers, but it is estimated that more than 150 Spanish companies export table olives. Therefore, it is not possible to name all Spanish companies, but examples of several of the largest processors are mentioned below. It is estimated that these top four exporting companies account for around half of all Spanish production.

[Agrosevilla](#) is one of Spain’s – and the world’s – leading exporters of table olives, exporting to over 70 countries. Agrosevilla is currently made up of 12 cooperatives and more than 4,000 associated olive-growers. On average, it produces more than 80 thousand tonnes of olives per year. Of the total quantity, around 60 thousand tonnes are from its own production and 20 thousand tonnes come from other olive suppliers. In addition to the production of table olives, Agrosevilla processes olive oil and has its own bottling facility in Chile with a distribution subsidiary in the USA.

Agrosevilla processes Hojiblanca, Manzanilla and Gordal olives in several ways. The company owns four brands, but also exports large quantities of unbranded olives in bulk. The company is fully export-oriented and meets all regulations regarding food safety (BRC and IFS certified), the environment (wastewater processing / ISO 14000 certified) and people (OHSAS 180001 certified). Innovations such as automated processing and the digital traceability of each farmer contribute to the competitiveness of the company. The main problem Agroseveilla faced over the past two years were tariffs imposed by the USA, given that the export to the USA – including very famous clients such as Subway – accounted for 25% of total exports.

[Dcoop](#) – Dcoop is the largest olive oil producer in the world, but the company is also one of the biggest Spanish exporters of table olives. Dcoop consists of a group of 180 cooperatives (the largest in Europe), of which 25 produce table olives. The company’s annual average table olive production is 100 thousand tonnes, meaning that Dcoop alone produces more than 15% of the total Spanish production. The company packs several own

brands and private labels. Some brands are more famous in Spain and in the USA than in the rest of Europe.

The largest quantities of Dcoop's table olives are of the Hojiblanca variety (from central Andalusia) but the cooperative also produces Manzanilla, Sevillana, Aloreña and Gordal varieties. They are the leading producer of Aloreña PDO olives in Spain. They have a wide range of olives and are able to enter many market segments because they have the necessary certifications. In line with sustainability trends, the company uses by-products, such as olive pits and leaves, to develop a circular bio-economy.

[Angel Camacho Alimentación](#) is one of the leading players in the global table olive industry. The company has an annual production of over 60 thousand tonnes and exports to more than 95 countries. It is headquartered in Seville, but it has subsidiaries in the USA, the UK and Poland. It is equipped with modern processing facilities and has several food safety certificates. It also offers complete programs for the retail, foodservice and food industry segments. The company sells more than half of its table olives as private labels, but also has its own brands: [Fragata](#), [Mario](#) and [Loreto](#).

One of the strengths of Angel Camacho is their investment in sustainability. The company operates the processing plants in the table olive industry with zero waste. Also, its olive plantations absorb the CO2 generated by the combustion of biomass used in the facilities, resulting in zero net CO2 emissions.

[Agolives](#) is a trade name of the Spanish company Aceitunas Guadalquivir. The company is present in more than 60 countries and processes 68 thousand tonnes of olives. Its processing facility in Seville is known as the world's largest and most technologically advanced olive processing plant. With a range of food safety, environmental, and CSR certifications, the company is able to supply many demanding market segments. It has five packaging lines which include three glass jar packaging lines, and two pouch packaging lines.

Agolives is putting effort into using innovative technologies and sustainable production. Some examples are the innovative implementation of water-reuse systems for olive filling machines and the installation of X-ray machines for the detection of foreign matter. The company has also implemented a biodiversity support project on an area of 425 hectares. For farmers, the company developed a sustainability protocol with good agricultural practices. The protocol includes the use of weather stations, deficit irrigation control, integrated farming, the use of pheromones for pest control, biological fertilisers (mycorrhiza), taking care of birds that eat insects, making "hotels" for ladybirds etc.

Examples of other large Spanish exporters include: [Borges International Group](#) (with Tramier brand in France and ITLV brand in Russia), [Serpis](#) (with anchovy and other stuffings), [Goya](#) (with a strong presence in the USA), [Interoliva](#) (with a patented ball stuffing process), [Manzanilla Olive](#) (with Manzanilla and Gordal olives), [Olive Line](#) (with a range of innovative preparations), [Industrias Alimentarias de Navarra](#) (with a production capacity of 24 thousand tonnes), [Aceitunas Cazorla](#) (own brands and private labels in 50 countries) and [Eurolive](#) (with the famous Crespo brand).

## Greece

Greek table olive exporters are united in the Panhellenic association of [table olive processors, packers and exporters](#) (PEMETE) and the sector is also supported by the Interprofessional [Table Olives Organisation](#) (DOEPEL). DOEPEL represents the interest of the whole sector: growers, cooperatives, processors and traders. PEMETE is focused on promotion, research and innovation. The promotional table olive consumption programme run by PEMETE is called [OliveYou](#). There are more than 100 Greek companies involved in the processing and export of table olives. Some examples follow:

[Intercomm Foods](#), founded in 1990, is the largest export and processing company of table olives in Greece. In addition to olives, the company is a processor and canner of peaches and apricots. The company is fully export-oriented, exporting 99% of its production and as a result it is, surprisingly, almost not present on the local Greek market. Intercomm exports its olives to more than 60 countries around the world. It exports olives under its own [Delphi](#) brand and produces olives as private labels for leading retail chains.

The company processes more than 30 thousand tonnes of olives per year. In order to reach demanding retail clients, the company invested in a modern processing and packing facility. Food safety certificates include BRS, IFS and ISO 22000. In addition to food safety, the company is CSR-certified with SA8000. Intercomm's clients include some of the leading European retailers such as Aldi, Edeka, Lidl, Tesco, Spar, Norma, Carefour.

[Konstantinopulous](#) is one of the leading Greek exporters of table olives. The company operates two large-scale plants with modern equipment and fully automated production processes. It has the capacity to process more than 20 thousand tonnes of olives per year. In addition to table olives, they also produce olive oil. The company exports more than 95% of all produced olives. Its most famous brand is [Olymp](#) which is exported to many countries together with private labels. The company has its own laboratory and has several food safety certificates.

Konstantinopulous has specially-designed areas for the reception of olives and underground fermentation tanks. The facilities include eight different packaging lines for different formats to satisfy customer needs and all market segments. The packaging lines include glass jars, cans, barrels, buckets, pouches and vacuum bags. The company also has automated pitting lines and wide varieties of stuffing.

Some of the other notable Greek table olives exporters include [Trofico](#) (producing olives since 1952), [Mani Foods](#) (exporting to more than 30 countries), [DEAS](#) (with a processing facility of 40,000 m<sup>2</sup>), [Amalthia](#) (producing 5000 tonnes of olives annually), [Medbest](#) (with a wide range of delicatessen olive products), [Kalogiros](#) (with one of the largest capacities in Greece), [Elbak](#) (a subsidiary of a German company with a large processing capacity), [GAEA](#) (a famous brand of olives and olive oil) and [Agrovim](#) (owner of the Iliada brand).

## Morocco

Several Moroccan table olive companies are the result of investments by French companies. One of the leading Moroccan table olive exporters, the Société Marocaine d'Industries Alimentaires (SOMIA), is a subsidiary of the French company [Comolive Crespo](#). Crespo invested in table olive processing in Morocco more than 50 years ago. [Framaco](#) is another French-Moroccan cooperation. Framaco has a partnership with the group BORGES (Spain) which sells table olives under the brand [Tramier](#).

Some French companies also developed a strong presence and strategic links with Moroccan table olive producers. For example, French company [Delieuze](#) sources olives from Morocco with [Cartier Saada](#) being the top supplier. Other Moroccan table olives suppliers include [Conserves Nora](#), [Siof](#), [Caprisaf](#), [Bled Conserves](#), [Agrucapers](#) and [Sicopa](#).

## Exporters from other countries

Examples of notable exporters from other countries are given below:

- Turkey - [Sera Foods](#) (with a distribution centre in Germany), [Önal Zeytin](#) (with an annual production capacity of 8,000 tonnes), [Zer Group](#) (one of the top 100 exporters in Turkey), [Tukas](#) (processing tomato and other products in addition to olives), [Maroli](#) (with a long trade history with Germany and the establisher of ethnic food retail chain [Marmara](#)), [Aydoğmuş](#) (with modern production facilities and a strong export to Europe) and [Ark Foods](#) (with a wide range of preserved vegetables).
- Egypt - [Nile Garden](#) (one of the leading exporters of table olives in Egypt), [Wadi Food](#) (with olive oil and a range of other products in addition to olives), [Plantform Agriculture](#) (with exports to various markets), [Olive Co](#) (famous for the brand Dr. Olive) and [Special Food Industry International](#) (with a variety of preparations).

Albania - [Sidnej](#) (a leading retail producer in Albania), [Cuedari](#) (specialised in bulk production and supply), [Zaimi Olives](#) (marinated olives), [Sagelo Olives](#) and [Amarlito](#).

## Tips:

Visit the websites of table olive industry associations in Spain ([ASEMESA](#)) and Greece ([DOPEL](#)) to learn more about the main European competitors.

Regularly visit leading European trade fairs, such as [ANUGA](#), [SIAL](#) and [Food Ingredients](#) to meet your competitors and potential clients.

## Which products are you competing with?

Due to its unique characteristics, it is not easy to find a real substitute for table olives. In European supermarkets, table olives are often sold on the shelves with other canned, preserved and pickled vegetables, but none of the typical products from this category can replace table olives. Looking at the health benefit aspects, olive oil can be considered a substitute product for table olives to some extent, as consumers are generally more aware of the health benefits of olive oil than those of table olives. However, those two are used in completely different ways.

## 4. What are the prices for table olives on the European market?

Calculating margins based on final retail prices for table olives is not indicative, and it is very difficult to elaborate, since it depends on the type of packaging and product.

The prices also vary across producing countries, per type, size of packaging, olive variety, brand and quality. For example, Greek Kalamata olives usually fetch higher prices than other types of olives, as they are marketed as specialty olives of protected geographical origin.

The average retail price of packed table olives in the last four years in Europe usually fluctuates between 1 and 2 € for one package of 150-200g. The price per kg is usually in the range of 5 to 10 €.

Table 3 below provides an approximate breakdown of table olive prices:

Table 3: Table olives price breakdown

Steps in the export process	Type of price	Example, margin addition and price breakdown (€/kg)	Share of the retail price
Production of raw olives	Farmer price	0.71 (based on the price in Spain in the 2020/2021 marketing season)	7.1%
Processing, packing and export of bulk packed olives	FOB, FCA or ExW price	1.2	12%



Storing, handling and shipping	CIF price	1.5	15%
Processing and retail packing	Final production price	5	50%
Selling bulk product to retail packing (retail jar of 150 to 200 g)	Wholesale price (including value-added tax)	7	70%
Retail sales of the final packed product (retail jar of 150 to 200 g)	Retail price	10	100%

Source: [Autentika Global](#) compilation based on industry sources

Please note that the share of the retail price that is paid to farmers varies a lot between producing countries and the type of product. It will also vary from year to year depending on market conditions, as retailers tend to keep stable prices for final consumers even in case of import price fluctuation. The above example is an illustration of the export of bulk products (packed in drums), meaning that the export of retail packed products would have a different structure.

If you add value to your produce through differentiated quality, food safety, certification and processing, your product will be able to fetch higher prices on the market.

This study was carried out on behalf of CBI by [Autentika Global](#).

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