

# The European market potential for olive oil

Last updated:  
03 January 2022

In the long term, the European market for olive oil is expected to show stable growth of 3%–5% over the next five years. This growth is mostly driven by changes in the consumption patterns of European consumers, like the rising interest in healthier cooking and the Mediterranean diet. The best opportunities for developing country suppliers can be found in France, the United Kingdom, Germany, the Netherlands, Switzerland and Belgium.

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## 1. Product description

Olive oil is a vegetable oil obtained from the fruit of the olive tree (*Olea europaea*). Olive oil can be produced by physical and mechanical means, or by chemical means. Most olive oils are produced by physical and mechanical means, through operations such as grinding, pressing, centrifugation and physical filtration. Olive oil can also be produced by chemical means, with the use of solvents, but those methods negatively affect quality. Depending on the production method, the composition and sensory characteristics of olive oil can be classified in several categories:

- Virgin olive oil – obtained solely by mechanical or other physical means. Virgin olive oils include several quality categories, such as extra virgin olive oil (with <0.8% free acidity), virgin olive oil (with 2%– 3.3% free acidity) and ordinary olive oil (with >3.3% free acidity). Olive oil that has more than 3.3% free acidity (also called ‘lampante’) is not fit for human consumption and must be refined before culinary use.
- Refined olive oil – obtained by refining lampante olive oil.
- Olive oil – blend of virgin and refined olive oils.
- Pomace oil – obtained by treating olive pomace with solvents or other treatments. After refining, pomace oil can be directly consumed or mixed with virgin olive oil to improve quality.

The above listed categorisation is based on International Olive Council (IOC) standards, but it has been simplified; the official classification uses more criteria. The European Union marketing standard is slightly different, defining ‘lampante’ as each olive oil with more than 2% acidity, excluding the ordinary olive oil category. Olive oil with lower quality, such as crude pomace or lampante, can be also used for technical purposes, for example, as a fuel. The market entry part of this study provides more specifics about quality categories.

The countries in the Mediterranean basin, where olive trees naturally grow, produce the largest volumes of olive oil, but other areas with a Mediterranean type of climate, such as California, Chile, Peru, Argentina, South Africa and Australia, also produce it. Spain is the world’s largest producer of olive oil: in 2020, more than 35% of the world’s production came from Spain, particularly from Andalusia. Another 11.5% came from Italy, 11% from Tunisia and approximately 8.5% from Greece. These four countries, together with Portugal, are also the largest exporters of olive oil.

Aside from primary processing countries, olive oil is blended and bottled in many countries around the world. Quality olive oil is produced using healthy olives through [mechanical crushing](#) in safe conditions. Time and temperature are critical quality factors in the process from harvesting to bottling. The perception that unfiltered oil is better than filtered [is unfounded](#).

Producing one litre of olive oil requires four to five kilos of olives on average. Specific varieties, such as Taggiasca, require using more olives per kilo of produced oil. Processing methods also significantly affect olive oil yield.

As a reference for the remainder of this report, 1 kg of olive oil is equivalent to approximately 1.12 L in volume.

This study covers general information regarding the market of olive oil in Europe, which may interest producers in developing countries. When 'Europe' is referred to in this report, it means the 27 member states of the European Union, plus the United Kingdom (UK), Iceland, Liechtenstein, Norway and Switzerland. When 'olive oil' is referred to in this survey, it involves the selection of products in Table 1. Export opportunities for extra virgin olive oil specifically are provided in more detail.

Table 1: Products in the olive oil product group

Combined Nomenclature Number	Product
15091020	Extra virgin olive oil
15091080	Virgin olive oil
15099000	Olive oil (refined or not)
15091010	Virgin lampante olive oil
15100090	Refined and ready to use olive pomace oil
15100010	Crude olive pomace oil

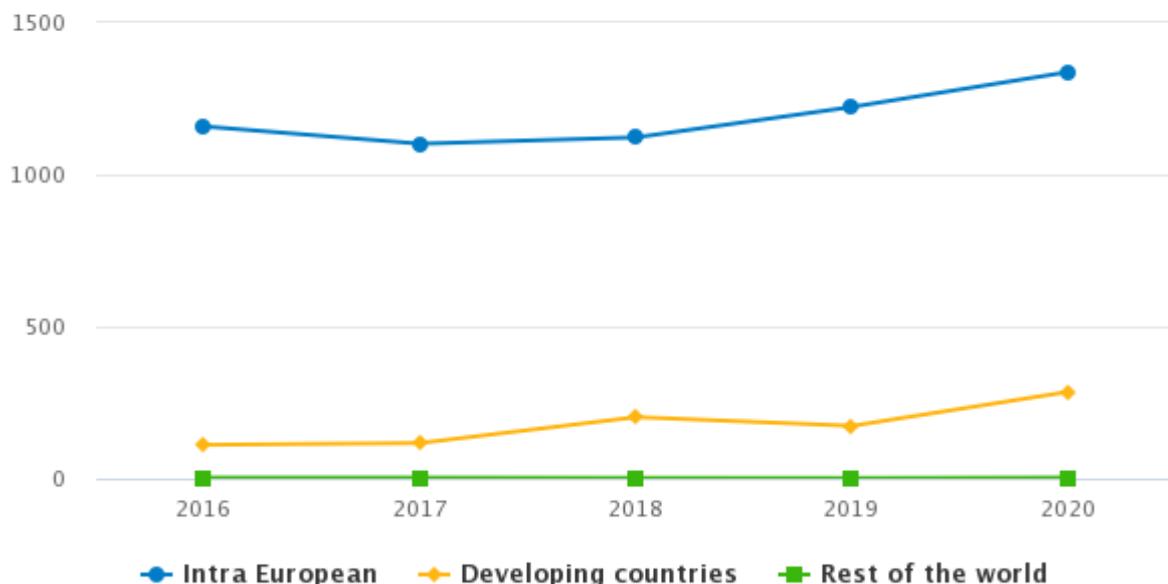
## 2. What makes Europe an interesting market for olive oil?

Europe is the largest importing region of olive oil in the world, accounting for more than a half of the world's total imports. European imports of olive oil have increased at a stable rate in the period 2015-2019. Although most of the olive oil traded is produced in Europe, almost all imports from outside of Europe come from developing countries.

Demand for olive oil in Europe is stable, but import quantities sometimes fluctuate due to variable production in the main supplying countries. Regular fluctuations in imports will continue to be influenced by the olive crops and price situation, rather than changes in demand. For example, an overproduction in 2019 lowered olive oil prices in Europe, positively affecting consumption during 2019 and 2020. The price of olive oil is higher compared to most other vegetable oils on the European market.

## Figure 1: European imports of olive oil

in tonnes



Source: Eurostat and Trademap

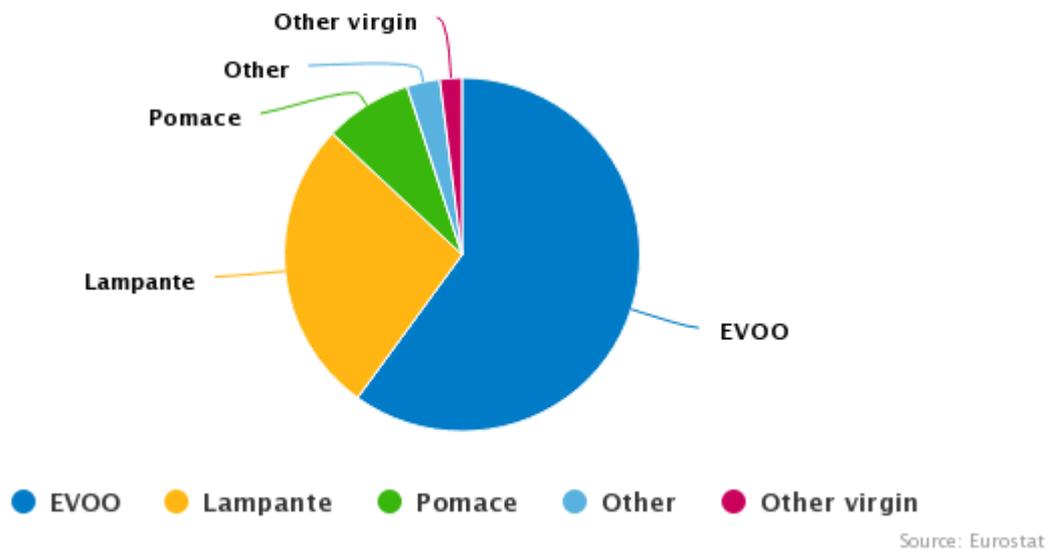
### Import characteristics

Between 2016 and 2020, European imports of olive oil increased by an average annual rate of 6%. However, imports of different types of olive oil have different growth rates. Where extra virgin olive oil experienced strong growth, other types of oils showed a slight decrease in imports. In 2020, import volumes surpassed 1.6 million tonnes, at a value of €3.7 billion, including intra-European trade.

Extra virgin olive oil made up 61% of all imported volumes in 2020, other virgin olive oil 11%, virgin lampante olive oil 10%, other olive oil 8%, crude pomace oil 7% and pomace oil 3%. During the last four years, virgin lampante olive oil experienced the strongest annual growth in imported volumes (17%), followed by crude pomace oil (12%), extra virgin olive oil (11%) and other virgin olive oil (8%). During the same period, imports of other olive oils decreased at an annual rate of 9%, while imports of pomace oils (not crude) decreased by an annual rate of 1%.

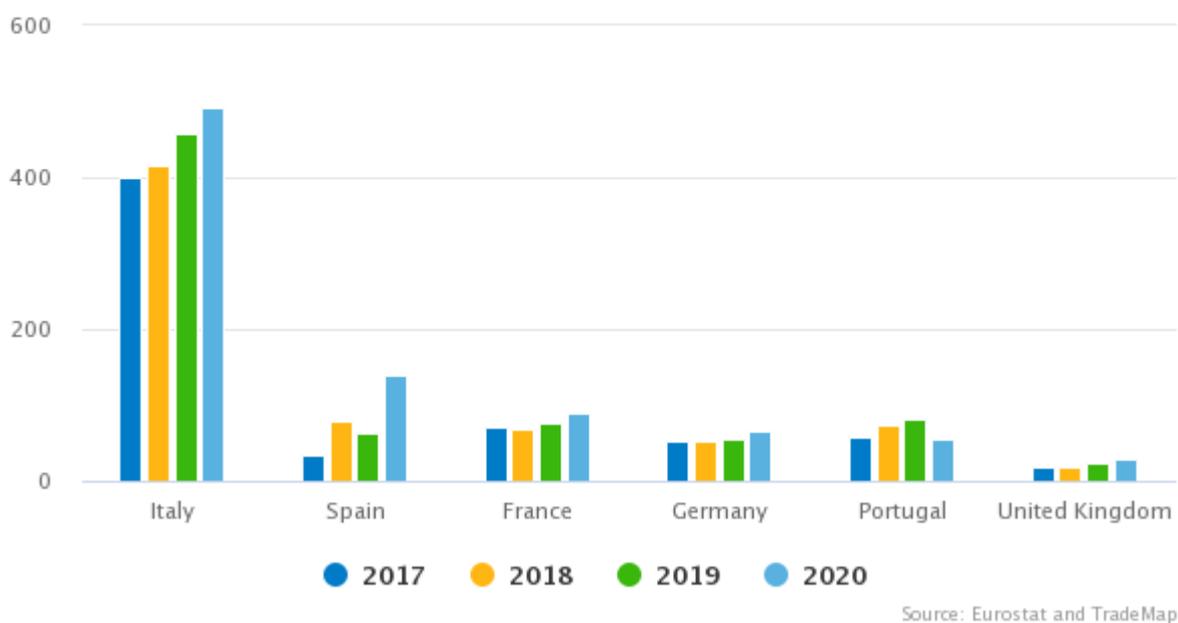
European countries import most of their olive oil from other European countries (intra-European trade). In 2020, 18% of Europe's imports of olive oil came from developing countries. The biggest share of intra-European trade consists of bulk olive oil blended by the largest olive oil companies before bottling. Significant volumes of bulk olive oil are not really traded but only moved across borders by these companies for processing. For example, the leading European olive oil producer has facilities in both Italy and Spain, which exchange the company's olive oil among them during processing.

**Figure 2: Share of European olive oil imports from developing countries, by type of olive oil**  
2020



Extra virgin olive oil (EVOO) is the type of olive oil most imported from developing countries. In 2020, European EVOO imports accounted for 60% of all olive oil imported from developing countries, followed by virgin lampante olive oil (27%). The import share of EVOO from developing countries showed a constant increase. Interestingly, crude pomace oil accounted for 8% of olive oil imports from developing countries. Crude pomace oil is three times cheaper on average than virgin olive oils. Therefore, developing countries should look for opportunities in exporting EVOO to Europe.

**Figure 3: Leading European EVOO importing countries**  
in tonnes



Note: EVOO specific data is only available for the past four years since the EVOO code was introduced in 2017.

In the last three years, almost all European countries experienced import growth of EVOO. The largest increases were in Italy, Spain and Portugal. These three countries were mostly importing and further processing (blending, bottling, etc.) imported EVOO. Among non-producing countries, the largest increases in EVOO imports were in Switzerland, the Netherlands, Poland, Denmark, Czech Republic, and Romania.

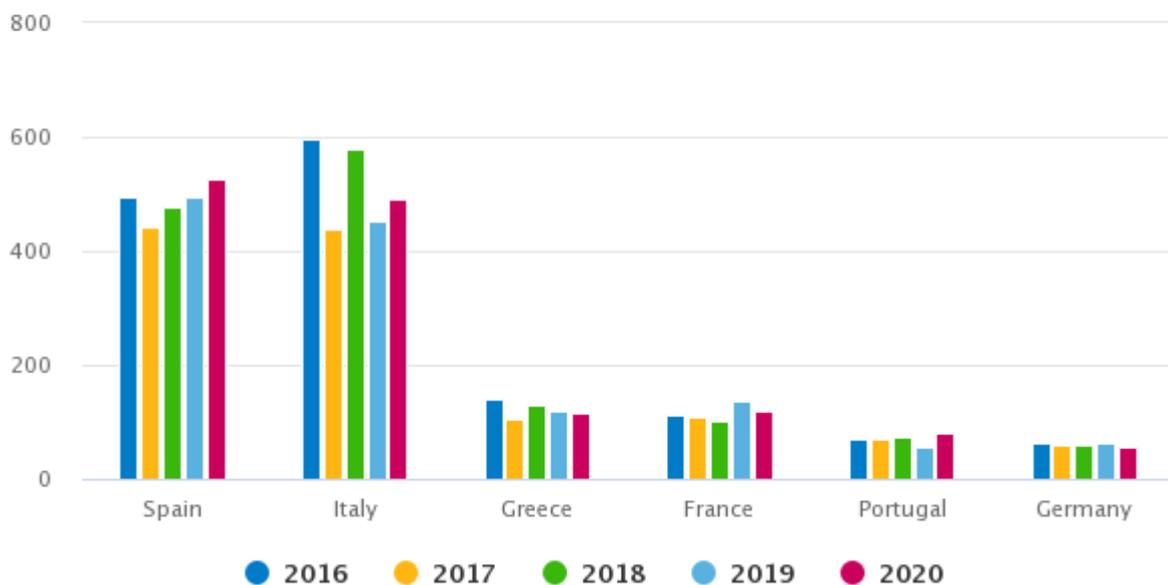
### Consumption characteristics

European olive oil consumption in 2020 was estimated at more than 1.52 million tonnes, which is approximately half of the total world consumption. Industry accounts for a large share of total consumption, as the leading producing and processing countries consume almost 90% of the total volume. In terms of retail sales, the largest volumes sold in Europe are in Italy and Spain, followed by France, Germany, the United Kingdom, Portugal, Switzerland and Greece.

Over next five years, the European market for olive oil is likely to increase at an annual growth rate of 3%–5%. The highest consumption growth rate is expected in Eastern Europe (5%–6% per year) while moderate growth is expected in Western Europe (1%–3% per year). Consumption of extra virgin olive oil is forecasted to grow the most, due to EVOO’s positive image regarding health benefits. Per capita consumption of refined and olive pomace oils will most likely decrease.

**Figure 4: Leading European olive oil consuming countries**

in 1000 tonnes



Source: International Olive Council

The figure above represents apparent consumption, meaning the difference between production and imports minus exports. Data also includes industrial consumption, which contributes to a significant share of imports. Production volumes vary per year, creating a wrong perception that demand constantly fluctuates. In reality, European demand for olive oil is stable in some countries and increasing in others, supported by overall constantly increasing retail sales.

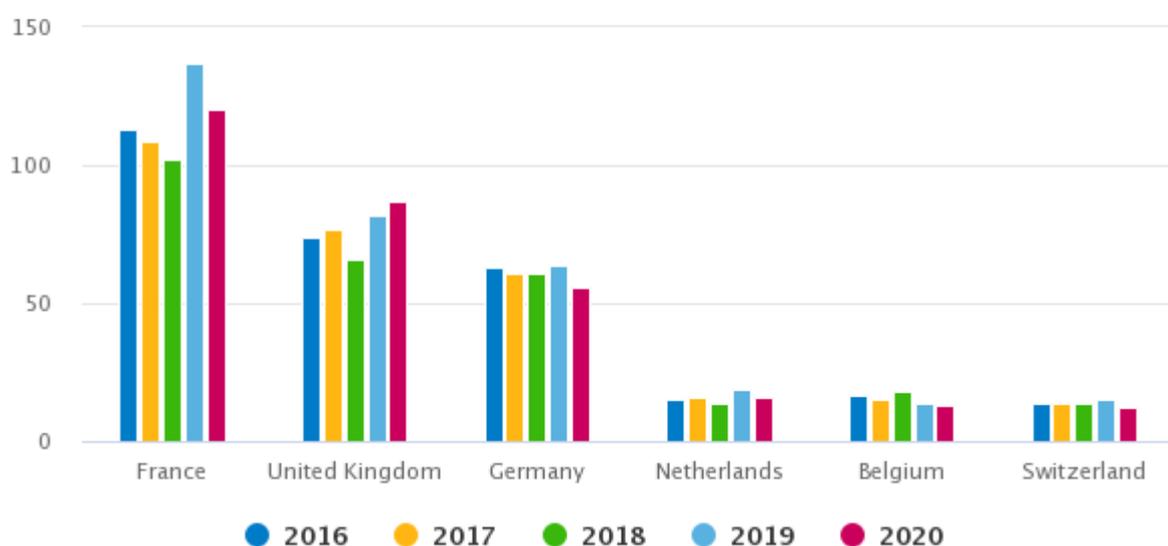
### 3. Which European countries offer most opportunities for olive oil exporters?

Exporters from developing countries may find opportunities in large and growing European consumer markets, such as France, the UK, Germany, Switzerland and Belgium.

The main olive oil importing countries in Europe — Italy, Spain and Portugal — are also the leading producers. Producing countries do not provide a lot of opportunities for retail sales of premium and branded imported olive oil. These countries instead import bulk olive oil from different destinations. Imported bulk oil is often further blended with domestically produced olive oil before bottling.

**Figure 5: Olive oil consumption in leading European non-producing countries**

in 1000 tonnes



Source: International Olive Council and calculations based on TradeMap data

Note: France is listed as a non-producing country above for convenience. In fact, France does produce olive oil, but not enough to meet its own internal market needs.

### France: increasing imports and little local production

France is the third largest importer of olive oil in Europe, after Italy and Spain. French imports of all types of olive oils reached 145 thousand tonnes in 2020. The French olive oil import value reached €436.5 million in 2020, making up 11% of total EU olive oil imports. EVOO makes up 61% of French olive oil imports, followed by other types of edible virgin olive oils (32%). French imports of olive pomace oil are insignificant, under 1%.

In 2020, France imported 65% of its olive oil import volumes from Spain, followed by Italy (22%) and Tunisia (1%). Tunisia is by far the leading developing country supplying to France, with a strong offer of organic olive oil. Morocco is also gaining share in the French market. French imports from Morocco strongly increased from 436 tonnes in 2016 to 1.2 thousand tonnes in 2020. Other emerging olive oil suppliers to France include Turkey, Israel, Algeria, Palestine and Lebanon, but their combined share is smaller than 0.3%.

Most of the olive oil imported by France is transported in bulk packaging, then blended and bottled by the leading olive oil companies. However, some of the leading brands are imported as bottled, mainly from Italy (such as Carapelli, Bertolli and Monini). The share of premium olive oil brands imported as bottled in France is small but increasing.

France also produces olive oil in its southern regions, namely in Provence, Occitanie, Auvergne-Rhône-Alpes and Corsica. Consumption of domestic olive oil accounts for less than 5% of France's total consumption and mostly purchased directly from producers. Retail sales of local premium brands is smaller than 0.5%. Currently, nine French olive oils have a [protected designation of origin](#) and two more are waiting for approval. One special category of olive oil in France is black fruity oil, which is produced from matured and fermented olives.

Approximately 60% of the olive oil market in France is sold to retail channels, and 40% to industry and food service. The leading retail brand of olive oil in France is **Puget** (owned by **Lesieur**, part of the **Avril Group**). Avril Group also has a subsidiary in Morocco: **Lesieur Cristal**. Other French brands include **Carapelli**, **Tramier** and **Monini**. Large volumes of olive oil are also sold as private labels (house brands of retail chains), such as **Carrefour**, **Leclerc** and **Auchan**.

Olive oil consumption in France is driven by the popularity of the Mediterranean diet and the healthy living trend. The retail share of organic olive oil sales in France is estimated at more than 10%. Consumption of organic olive oil is constantly increasing in France, thanks to lower prices when compared to other organic foods. Several private labels are sold as organic (mostly of Tunisian origin) and the price gap between organic and conventional oil is narrowing over time.

Figure 6: Puget olive oil (France's leading brand)



Source: Photo by [kiliweb](#) per Open Food Facts, [Creative Commons Attribution-Share Alike 3.0 Unported license](#)

Figure 7: Black fruity (Le fruité noir) olive oil



Source: Photo by [kiliweb](#) per Open Food Facts, [Creative Commons Attribution-Share Alike 3.0 Unported](#) license

### Tip:

To learn more about the French olive oil industry and market, visit the website of [France Olive, the French olive interprofessional association](#) (formerly AFIDOL, in French).

## The United Kingdom: increasing consumption and domination of private label

Olive oil is an established commodity in the United Kingdom, so industry experts do not believe that Brexit (the UK's exiting the EU) will influence olive oil prices in the UK in the long term, in spite of forecasted increases in inflation and labour costs. Consumers in the UK will continue to buy olive oil and direct import volume is likely to increase, at the expense of intermediaries in Germany, Belgium and the Netherlands.

In 2020, the UK's imports of olive oil reached nearly 90 thousand tonnes, at a value of €225 million. Between

2016 and 2020, imports increased annually by 4% in volume, but decreased in value by 3%. This decrease in import value reflects lower import prices, especially during 2019 and 2020. Most imported olive oil in the United Kingdom is consumed within the country, without any significant re-exports. Imports from developing countries are rather small but can provide opportunities, as traders are interested in sourcing from new destinations.

In 2020, the share of ordinary (not virgin) olive oil imported by the UK among the total British olive oil imports was 36%, followed by EVOO (33%), virgin olive oil (23%) and olive pomace oil (8%). The market share of ordinary olive oil in the UK is however shrinking, while EVOO's share is growing. The UK is also the largest non-producing European importer of olive pomace oil, which is largely used for frying, blending and by industry. Significant volumes of olive pomace oil are sold in the UK as private label blends.

The British olive oil market overall is quite concentrated and mainly dependent on imports from Spain and Italy. In 2020, the United Kingdom imported 64% of all its olive oil from Spain, followed by Italy (23%). Significant volumes (10%) were also imported from non-producing countries, such as Belgium, the Netherlands, Ireland and Germany. Olive oil imported from Spain into the UK is mostly used by leading bottling and blending companies to produce olive oil blends.

Imports of olive oil from developing countries in the United Kingdom are rather small at less than 300 tonnes. Morocco (with 89 tonnes) was the leading emerging developing country supplier in 2020, followed by Palestine (85 tonnes), Turkey (52 tonnes), and Lebanon (24 tonnes). The United Kingdom provides opportunities for fair-trade certified olive oil. Several brands from Palestine and Syria bearing fair-trade certification are present in the British market.

Most of the olive oil in the UK is sold under private label brands, such as Tesco, Sainsbury's, ASDA and Morrisons. The leading independent brand is [Filippo Berio](#) (by [Salov](#) group). Filippo Berio is sold in several different blends of olive oil from Italy, Spain, Greece and Tunisia, but there also one product with 100% Italian origin. This brand is also exported from the UK to other European countries. Other independent brands include [Napolina](#) and [Olivio](#) ([Princess Group](#)) and [Il Casolare](#) ([Farchioni Olii SpA](#)).

**Tip:**

Find information about the edible oil sector in the United Kingdom on the website of the [National Edible Oil Distributors' Association \(NEODA\)](#).

Figure 8: Filippo Berio olive oil (leading brand in the United Kingdom)



Source: photo by [tacinte](#) per Open Food Facts, [Creative Commons Attribution-Share Alike 3.0 Unported](#) license

Figure 9: pomace oil blend, packed in the UK



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## Germany: leading market for organic olive oil in Europe

Total imports of olive oil to Germany have increased on average by 4% annually since 2016. In 2020, Germany imported 85 thousand tonnes of olive oil worth €325 million. However, the structure of imports is changing. Imports of EVOO have increased by an annual rate of 12% while imports of lampante olive oil have decreased by 12% annually. This means that German consumption of quality olive oils is increasing. Of all imported olive oil to Germany, a 79% share was EVOO, followed by ordinary olive oil (9%), other virgin olive oil (8%) and other oils (4%).

Italy is the leading supplier of olive oil to Germany (55% share in 2020), followed by Spain (23%) and Greece

(15%). Among the leading olive oil suppliers to Germany, Greece has grown the fastest, increasing its exports of EVOO to Germany from 5.8 thousand tonnes to almost 13 thousand tonnes since 2016. Developing countries account for only 2% of Germany's olive oil imports, with Tunisia as the leading supplier, followed by Turkey. Imports from Syria are increasing at the fastest rate, from 31 tonnes in 2016 to 168 tonnes in 2020.

Most of the olive oil sold in Germany is sold under a private label, such as Primadonna (by discounter chain [Lidl](#)), El Cantinelle and Cucina (by [Aldi Süd](#)), Casa Morando (by [Aldi Nord](#)), Aro (by [Metro Cash & Carry](#)), REWE Feine Welt and ja! (by [REWE](#)), and Edeka and Gut&Günstig (by [Edeka](#)). Most private label oils are blends from different origins. Independent brands include [Bertolli](#) and Carapelli (Italian), Mazola (Spanish origin by [Peter Kölln](#)), [Minerva](#), [Minos](#) and [Jordan](#) (Greek), [Ybarra](#) (Spanish) and La Española (by [Feinkost Dittmann](#)).

As the largest market in Europe for organic products, Germany provides opportunities for suppliers of organic olive oil. A large share of organic olive oils in Germany are sold under private label brands of specialised organic retailers, such as [Bio Markt](#), [Alnatura](#), [Basic](#), [Bio Company](#), [ebl-Naturkost](#) and [Super Biomarkt](#). Leading retail chains also have their own organic private labels. New suppliers should be aware that Germany is a very price competitive market and many organic brands do not have significantly higher prices compared to brands of conventional olive oil.

Figure 10: Primadonna extra olive oil (private label of discounter Lidl)



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Figure 11: 'Bio ZENTRALE' organic olive oil



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**Tip:**

To find more information about the German olive oil market, contact the [Information Office Olive Oil in Germany](#).

## The Netherlands: increasing market and price-sensitive consumers

Dutch imports of olive oil regularly fluctuated over the last five years, reaching 24 thousand tonnes and €80 million in 2020. Almost 5 thousand tonnes were re-exported to other destinations, primarily to Belgium and the United States of America. In 2020, EVOO accounted for 43% of all imported olive oil in the Netherlands, followed by ordinary (not virgin) oil (34%), other virgin oil (15%) and other oils (8%).

In 2020, the Netherlands imported 60% of its olive oil from Spain, followed by Italy (17%), Belgium (9%) and Greece (4%). Imports from developing countries to the Netherlands amount to 5% of the total olive oil imports, with Morocco as the leading supplier (613 tonnes in 2020), followed by Palestine (387 tonnes of ordinary olive oil in 2020). Other emerging suppliers include Turkey, Syria, India and Tunisia, but with very small volumes.

Dutch consumers are traditionally heavy users of butter and sunflower oil. However, this consumption pattern is changing, and consumption of fats is decreasing at an annual rate of -9%. On the other hand, consumption of olive oil in the Netherlands is growing. In spite of Dutch consumers being price sensitive, consumption of high-priced oils, such as premium, infused and organic, is growing.

More than 60% of all olive oil sold in the Netherlands is sold under private labels. The leading retail chains that sell olive oil under their own private labels in the Netherlands include [Albert Heijn](#) (AH), [Aldi](#) (LaVilla), [Jumbo](#) (Jumbo) and [Lidl](#) (Primadonna). Sales of independent brands of olive oil in the Netherlands are mainly dominated by Italian names, such as [Bertolli](#), Monini and Carapelli.

### Tip:

To learn more about the Dutch olive oil market, contact the [Netherlands Oils and Fats Industry](#) (MVO).

## Switzerland: market dominated by supply from Italy

Switzerland's olive oil imports have been growing at an annual rate of 6%, reaching 19 thousand tonnes valued at €95 million in 2020. Approximately 50% of these imports are imported in retail packaging and the remaining half in bulk packaging. In 2020, Switzerland imported 92% of varying types of virgin olive oils and 8% of other types of oils (not-virgin and pomace). Imports of olive pomace oil are insignificant (less than 1%).

Unlike other major European markets, the leading supplier of olive oil to Switzerland is Italy with a 49% share, followed by Spain (29%) and Greece (10%). Only 4% of Switzerland's olive oil imports come from developing countries, almost entirely from Tunisia. In 2020, Switzerland imported more than 606 tonnes of olive oil from Tunisia, compared to 87 tonnes from all other developing countries combined.

A large share of the olive oil sold in Switzerland is sold under private labels of leading retail chains, such as [Coop](#) (Coop) and [Migros](#) (Migros and Alexis). Other leading brands in the Swiss market include Monini, Bertolli, Filippo Berio and Carapelli. Most of the olive oil sold in Switzerland is made of blends of oils from different origins. However, retail chains have started to increasingly sell single-origin olive oils., such as Coop's Spanish olive oils Picual Premium and Almazaras De La Subbética.

Sales of organic olive oil in Switzerland are growing, currently making up approximately 10% of total retail sales. Organic olive oil is mostly sold under private labels of supermarkets, such as Coop (naturaplan) and Migros (Migros bio). Leading independent organic olive oil brands include Rapunzel, Alnatura and Morgia.

### Tip:

Contact the [International Olive Oil Foundation](#) (IOF) to learn more about olive oil quality in Switzerland. IOF certifies olive oils for quality with the IOF seal.

## Belgium: increasing importer

Belgium is a growing importer of olive oil. In all olive oil categories combined, Belgium imported more than 22 thousand tonnes, or €74.5 million, in 2020. EVOO made up 59% of all Belgian olive oil imports, followed by virgin olive oil (19%), ordinary (not virgin) olive oil (18%), olive pomace oil (3%), and virgin lampante oil (1%). EVOO is the fastest-growing category, increasing from 7.7 thousand tonnes in 2017 to 13.3 thousand tonnes in 2020.

Belgium olive oil imports come from Spain (48%), followed by Italy (22%), France (11%), and Tunisia (5%). Among the leading suppliers of olive oil to Belgium, Greece's exports are the fastest growing. Greece has doubled its exports of olive oil to Belgium, from 588 tonnes in 2016 to 1,149 tonnes in 2020. Tunisia is the leading developing country supplying olive oil to Belgium (1,198 tonnes in 2020), followed by Turkey (301 tonnes), Morocco (204 tonnes), and Syria (62 tonnes).

A large share of olive oil in Belgium is sold under private labels by retail chains, such as [Colruyt](#) (Boni), [Delhaize](#) (Delhaize and 365), Carrefour (Carrefour), Aldi, Lidl and Marko. Independents brands include Bertolli, Monini, Carapelli, Filippo Berio, Borges and many others. Sales of organic olive oil in Belgium have been constantly growing. Belgium is both a large consumer market and a re-exporter of olive oil. In 2020, Belgium exported 5.7 thousand tonnes of olive oil, mainly to the Netherlands.

### Tip:

For information about the Belgian edible oils market and industry, contact [Lipids and Proteins Belgium](#) (Liprobél), an association that represents producers of vegetable oils, proteins and refined animal fats.

## 4. Which trends offer opportunities on the European olive oil market?

The growing consumer interest in olive oil in Europe has three main driving forces combined: the growing popularity of the Mediterranean diet, the increasing awareness of olive oil's health benefits and the quality of certain types olive oil. Promotion of single-origin premium olive oil, as well as sustainable and ethical production methods are favourable aspects for emerging suppliers. On the other hand, the declining price of both conventional and organic olive oils makes up the main threat for suppliers willing to position their products in the mainstream segment.

To find out more about general trends, read our study about [Trends in the European Processed Fruit and Vegetables Market](#).

### Healthier eating trend and popularity of Mediterranean food

Olive oil, especially EVOO, enjoys a good reputation among consumers in Europe. Olive oil is an integral part of the Mediterranean diet. Several [studies](#) indicate that a Mediterranean diet can help lower the risk of cardiovascular diseases, overall cancer incidence, neurodegenerative diseases, diabetes, and early death.

According to a [World Health Organisation report](#), several European countries have already included the Mediterranean diet as a part of their official national dietary guidelines.

In addition to the perceived health benefits of consuming olive oil, the rising popularity of food dishes that use olive oil also help drive consumption. These dishes often come from southern European cuisines, such as Italian, Spanish and French, but also the emerging popularity of [Middle Eastern and North African cuisines](#). Mediterranean dishes and olive oil use are also promoted by many celebrity chefs, as well as TV cooking and travel shows across Europe.

Several European Commission projects also promote the Mediterranean diet and olive oil consumption, including [MedDiet](#), the [Mediterranean Diet Virtual Museum](#) and [MedEat Research](#). Other organisations promoting Mediterranean food include the [Mediterranean Diet Foundation](#), in Barcelona, and the [International Foundation of Mediterranean Diet](#), in London.

Several national olive oil trade associations constantly invest in the promotion of olive oil in Europe and abroad. such as the [Spanish Olive Oil Interprofessional](#), which launched the [Olive Oil World Tour campaign](#) in 2018. The Greek Association of Industries and Processors of Olive Oil (SEVITEL AMKEPE) launched a similar project named [Great Olive Oil](#) to promote consumption of the European olive oil in non-EU countries. Similarly, the [Italian Consortium of Olive Oil Producers](#) (UNAPROL) launched [The Perfect Food](#) project to promote consumption of European olive oil.

According to its [2019–2030 agricultural outlook report](#), the European Union expects olive oil consumption to grow by 400,000 tonnes until 2030. Behind this expected growth are the changing eating habits of Europe's population and the younger generations' concern with health and the environment.

## **New Olive Oil Flavours**

The popularity of olive oils infused with aromatic ingredients, such as chilli and garlic, is on the rise. Some consumers make flavoured olive oils at home, but due to convenience, olive oil companies have expanded their product ranges with flavoured olive oils. According to MINTEL, garlic and chillies are now established flavours, but new ones are appearing on the market, such as lime, truffle, pesto, curry, rosemary, basil and smoked oil.

To support innovation and quality of infused olive oils, the [London International Olive Oil Competitions](#) has introduced a new category award for best infused olive oils. Depending on flavour types, infused olive oils are segmented into three categories: herbs and spices flavoured, fruit flavoured, and others. In 2020, Greek company [Hellenic Agricultural Enterprises](#) won platinum and gold awards for their grapefruit/bergamot and lemon/oregano infused olive oils.

Other companies awarded for their innovative infused olive oils include [Pellas Nature](#) (Greek herbs), [Sakellaropoulos Organic Farming](#), Gemstone (ginger, lime and basil), [Efthimios Christakis](#) (strong smoke), [Ariston](#) (lime, curry, chilli, pesto), [Delicious Crete](#) (smoked), and [Food Cross](#) (white truffle).

## **Consumption of organic olive oil is increasing**

According to several industry sources, sales of organic olive oils in Europe are constantly growing. France and Germany are the largest markets for organic olive oil, accounting for approximately half of the total European consumption. Retail sales are roughly estimated to be more than €5 billion. Organic olive oil production is likely to increase in the short term, as to the area planted in European producing countries grows as well. Olives cover 1/3 of the permanent organic crop area in Europe.

Growing production and offer of organic olive oil, especially from Tunisia, has forced organic olive oil prices down. The price difference between conventional and organic olive oils has shrunk over the last years. Many European retail chains now sell organic olive oil for lower prices than some premium conventional olive oils, often under private labels.

Independent organic olive oil producers are increasingly exhibiting at leading European trade fairs. The world's leading trade fair for organic food, [Biofach](#), has introduced a competition for organic olive oil, the Olive Oil Award Biofach. In general, the number of organic food events in Europe is growing. Other organic food events with increasing participation of organic olive oil producers include [Natural & Organic Products Europe](#), [Organic Food Iberia](#), [Free From Functional Food Expo](#), [Natexpo](#) and [Nordic Organic Food Fair](#).

## Higher quality olive oils entering the market

The current market share of premium quality organic olive oils in Europe is small but increasing. Many independent brands of premium olive oil are coming up on the market. Until recently, premium olive oils were mainly sold in specialised shops, or directly from producers. But now, some leading retailers are introducing high-quality olive oil too. In bigger European cities, retail chains have special corners with special or fine foods, where premium olive oils of independent brands are sold.

The number of single-origin olive oil introductions by retail chains is growing. A growing number of wholesalers are also distributing oils connected to specific production regions, or even from single estates. Another indication of the market 'premiumisation' is the appearance of [monovarietal oils](#), such as Monini, Nocellara, Frantoio and Coratina.

Celebrity chefs and olive oil experts influence consumers to select better quality olive oils. Olive oil tasting courses are relatively new, but they are increasingly popular among European consumers. Specialised olive oil shops also educate consumers about the different types and qualities of olive oil through in-house tasting and information about production and origins. Specialised olive oil retailers are constantly looking out for new origins in Europe, such as Croatia, Slovenia, and Malta, or not, such as Morocco, Tunisia, Lebanon, and Jordan.

A [protected designation of origin](#) (PDO) provides further promotion of higher quality olive oils. In the European Union, nearly 140 different olive oils have a PDO and 20 more have pending applications. Italy has the largest number of registered PDO olive oils (46), followed by Spain (31), and Greece (30).

### Tips:

Promote the various applications and nutritional properties of olive oil. However, avoid health and nutritional claims that are not backed by scientific evidence. Nevertheless, a good idea is to test your olive oil for its content of polyphenols, which are specifically connected to the health benefits of olive oil.

Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fair in Europe for olive oil trends and trade are [SIAL](#), [Anuga](#), [Alimentaria](#), [TuttoFood](#) and [BioFach](#).

If you produce organic olive oil, consider participating in specific organic food and olive oil events and competitions, such as [Biol](#) (Italy), [Biofach](#) (Germany), [Natural & Organic Products Europe](#) (United Kingdom), [Organic Food Iberia](#) (Spain), [Sana](#) (Italy), [Natexpo](#) (France) and [Nordic Organic Food Fair](#) (Sweden). It is also important to have a distributor. Promoting olive oil without being able to distribute it in the target market may harm sales.

Participate in international competitions if you aim to place your olive oil in the premium segment. You can find the list of award winning olive oils from international competitions at the [EVOO World Ranking](#). When choosing a competition, select those that have respected, reliable and independent judges.

Consider placing a label on your olive oil showing where the olive oil was tested and by what panel. This may provide a strong competitive advantage, because it is not frequently done.

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

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