

# The European market potential for table olives

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The European market for table olives is expected to grow 3–4% over the next five years. This growth is mostly driven by changes in European consumption patterns, like the rising interest in healthier cooking and the Mediterranean diet. The best opportunities for developing country suppliers can be found in Italy, France, Germany, the United Kingdom, Romania and Belgium.

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## 1. Product description

Table olives are a well-known and widely consumed food in the European market. They are fruit of the olive tree (*Olea europaea* L.). The fruit is treated to remove its bitterness. To make olives edible, it is important to remove some or all the oleuropein, a phenolic bitter compound. After the oleuropein is removed, table olives are preserved and packed. The packages can be with or without liquid. There are [several methods](#) for removing oleuropein.

The table olives covered by this study are categorised under the HS trade code 20057000. There are other statistical codes related to olive trade and processing, such as for fresh olives, frozen olives, provisionally preserved olives unsuitable for immediate consumption and olives preserved in vinegar or acetic acid. These are not covered in this study.

Figure 1: Table olives



Source: Image by [Vagelis Dimas](#) from [Pixabay](#), Pixabay [content license](#)

There are different varieties of table olives, such as green, black and mixed olives. The most common varieties include Manzanilla, Kalamata and Hojiblanca, with Spain, Greece and Italy being prominent producers. Spain is the largest producer of table olives in the EU, supplying nearly half of the total European production.

Less than 10% of all harvested olives are used as table olives. More than 90% of the remaining olives are processed into olive oil. The International Olive Council (IOC) forecasts [world table olive production](#) will reach 2.65 million tonnes in the 2023/24 season. This is 12% down from the provisional 3.01 million tonnes forecasted for 2022/23.

In the European market, table olives are primarily used in the food sector. They are widely consumed as starters, in salads and as ingredients in Mediterranean cuisine, such as pasta and pizza. The demand for healthy, plant-based foods has boosted their consumption due to their high content of healthy fats, particularly oleic acid. Olives are an essential part of traditional diets in countries like Spain and Italy.

Like other food processing activities, table olive production involves multiple steps and needs to be performed properly. If you have specific problems with processing table olives, consult the latest available research. The ScienceDirect research portal [regularly publishes research papers](#) on many issues. ResearchGate also [publishes research papers](#) relevant to the table olive industry.

## 2. What makes Europe an interesting market for table olives?

Europe is the largest importing region of table olives in the world, accounting for around half of total global imports. This is based on statistics that include intra-European trade. European imports of table olives increased by 7% in value terms in the 2019–2023 period. Although most table olives are produced in Europe, almost all imports from outside of Europe are from developing countries.

If intra-European trade is removed from the analysis, the largest importers of table olives are the USA, followed by Brazil and then Europe.

European demand for table olives is stable. However, import quantities sometimes fluctuate due to variable production in the main supplying countries. Regular fluctuations in imports will continue to be influenced by olive harvests, supply and prices, rather than by changes in demand.

Source: [Autentika Global](#), [Eurostat](#) and [ITC TradeMap](#), 2024

Consumption preferences depend on the market. Olives are used more as ingredients than they are consumed as snacks. However, olive snacks are more popular in Mediterranean countries than in the rest of Europe. Olives are often consumed as snacks in producing countries and as part of the traditional cuisine, for example “tapas” in Spain, “antipasti” in Italy and “meze” in Greece. The snack market is growing in other countries through product innovations (e.g. [Olly's](#) in the UK).

Roughly 60% of olives are consumed by the foodservice sector; the remaining 40% is sold in the retail segment. Green olives have a larger market share than black olives. In addition to traditional olive products, Europe has seen growing demand for organic and specialty olives. Organic olives are grown without synthetic pesticides or fertilisers, appealing to health-conscious consumers. Specialty olives cater to the premium market segment. These olives are often stuffed with artisanal ingredients or marinated in gourmet oils and herbs.

European producers, especially in Spain and Greece, are increasingly focussing on sustainable farming practices and packaging innovations. Many olive farms are implementing integrated pest management and water-efficient irrigation systems. Recyclable and biodegradable packaging is also gaining popularity in response to stricter environmental regulations and consumer awareness across Europe.

This study covers general information regarding the overall market for table olives in Europe that is of interest to producers in developing countries. The term ‘Europe’ in this study refers to the 27 Member States of the European Union (EU), plus the United Kingdom (UK) and EFTA countries (Iceland, Liechtenstein, Norway and Switzerland). The term ‘developing countries’ is used for [countries that are listed on the OECD-DAC list of ODA recipients for 2024 and 2025 flows](#).

## 3. Which European countries offer the most opportunities for table

## olives?

Over the next five years, the European market for table olives is expected to increase at an annual rate of 3–4% in value terms and 1–2% in volume terms. The annual growth rate is expressed as the cumulative annual growth rate, or CAGR. This increase is driven by a combination of factors, including the growing popularity of less processed food products and healthy snacking trends. Other factors that benefit table olive consumption include consumer preferences for the Mediterranean cuisine and natural flavours.

Source: [Autentika Global](#), [Eurostat](#) and [ITC TradeMap](#), 2024

Exporters from developing countries should look for opportunities in large and growing European markets. The main ones of interest are Italy, France, Germany, the United Kingdom, Romania and Belgium. Spain and Italy, both table olive producers, are among the leading consumer markets. However, Italy is more attractive for developing country suppliers than Spain. Italy imports three times more table olives than it exports. Spain, on the other hand, exports 12 times more than it imports.

Europe's largest importer is Italy, which imports more than 100,000 tonnes annually, followed by France and Germany. Over the past five years, the UK has experienced the fastest growth rate (6.9%). France, the second-largest importer, experienced negative growth of 1.8% during the same five-year period.

European table olive production has been relatively high for most of the last five years. This has affected imports negatively. The lowest production was recorded in 2019/20, when it amounted to 771,000 tonnes. The IOC forecasts that European table olive production will drop to a [23-year low of 600,500 tonnes in 2023/24 \(PDF\)](#).

Source: [Autentika Global](#), International Olive Council, [ITC TradeMap](#), \* estimate, \*\* forecast, 2024

The leading European consumer of table olives is Spain, which had an estimated 28% share in 2023/4, followed by Italy (19%), France (14%), Germany (7%) and the UK (7%). Total European consumption has remained relatively stable over the past five years, growing at an annual rate of 0.1%. Although the IOC has not provided consumption data for the UK since 2020/21, table olive consumption seems to have increased the most in the UK. This is based on apparent consumption in the UK, calculated as the difference between table olive imports and exports.

Source: [Autentika Global](#), International Olive Council, [ITC TradeMap](#), \* estimate, \*\* forecast, 2024

Note: France is listed as a non-producing country for convenience. While France does produce table olives, this production is not enough to meet its internal market needs. Around 1% of the table olives consumed in France are locally produced. The rest are imported.

## Italy: The dominant importer in Europe

Italy is Europe's leading European table olive importer. Since 2019, Italian imports of table olives have been increasing at an annual rate of 1.5%. Imports surpassed 100,000 tonnes in 2023. More than half (55%) of these imports are sourced from Spain, followed by Greece (31%), Egypt (6%) and Morocco (5%). Türkiye has lost market share as an emerging supplier. Türkiye's supply to Italy dropped from 2,200 tonnes in 2019 to 860 tonnes in 2023.

Most imported table olives in Italy are used as ingredients in the foodservice segment. Pizza restaurants are famously large users of table olives. Table olives are used as ingredients in many other Italian dishes too. Table olives are also used as snacks without further preparation or as main ingredients in some dishes such as [olive](#)

[ascolana](#). This is a well-known Italian appetiser of fried olives stuffed with meat.

Many table olives in Italy are sold under private labels. The leading private labels are those of retail chains [Conad](#), [Coop](#), [Selex Group](#), [Esselunga](#), [Carrefour](#) and [Eurospin](#). Some of the largest suppliers of retail chains with private labels are [Neri](#), [Iposea](#), [Inpa](#), [Madama Oliva](#), [Polli](#), [Coelsanus](#), [Saclà](#) and [Frantorio di Sant'Agata](#). Several of these companies use both imported table olives and Italian olives. Italy's renowned olive oil producer Monini also produces [organic table olives](#).

When targeting the Italian market, be aware of the local competition. Italy is the third-largest producer of table olives in Europe. Sicily and Puglia are the largest producing regions, accounting for 75% of national production.

Table olives in Italy are processed in multiple ways, and there are regional differences and preferences. Examples of Italian table olive exporters are [Ciro Velleca](#) (brand Vittoria), [Cirillo Group](#), [Ital Carciofi](#), [Citres](#), [Cannone](#), [Fratepietro](#), [Dillilo](#), [La Rocca](#) and [Colavita](#).

Figure 6: Pitted table olives sold by Esselunga



Source: [Olive taggiasche denocciolate - 3](#), by [telperion87](#), per [Open Food Facts](#), under the [CC BY-SA 3.0 license](#)

Italy is home to four table olive varieties that have a Protected Designation of Origin (PDO). One such famous variety is [Bella di Cerignola](#), known as the largest table olive in the world, which is protected under the PDO name [La Bella della Daunia](#). The other three PDO table olives are [Nocellara del Belice](#), [Oliva Ascolana del Piceno](#) and [Oliva di Gaeta](#). In Sicily, Nocellara del Belice is processed using the specific Castelvetro method. This involves placing green olives in lye, followed by the addition of salt and several days of curing.

#### Tips:

Learn more about the Italian olive industry and market from the website of the Italian Union of Olive Producers ([UNAPROL](#)) (in Italian).

Consult the European Union's [Geographical indications registers](#) to explore which countries protect their table olives sold in Europe.

Search for Geographical Indications across the EU and beyond on the [GI view system](#) of the EU's Intellectual Property Office ([EUIPO](#)).

## France: An IOC member with a symbolic domestic production

France is the second largest European olive importer and a key market for developing country suppliers. Since 2019, French imports of table olives have decreased at an annual rate of 1.8%, reaching 83,000 tonnes in 2023.

Thanks to relatively good olive production in the EU over the past years, Spain has overtaken Morocco as France's largest supplier. Most imports were from Spain (42%), followed by Morocco (35%), Belgium (8%), Egypt (7%) and Greece (2%). Egypt is the fastest growing supplier. French imports from Egypt increased from 1,000 tonnes in 2019 to 6,000 tonnes in 2023.

Import prices of Spanish and Greek table olives in France are higher than those of North African olives. The average import price of Spanish table olives in 2023 was €2,000 per tonne, while the price from Greece was €3,650 per tonne. The price from Morocco was €1,757 per tonne. The average import price from Egypt was €1,136 per tonne. France imports more retail-packed (value-added) olives from Europe than from Africa. Most of the Egyptian olives are imported in bulk packaging and repacked in France. Most table olives consumed in France are imported in bulk.

The consumption of table olives in France is stable. It amounted to 88,500 tonnes in 2023. Consumption growth is driven by the popularity of good and healthy food. Olives are a very popular ingredient in French cuisine. The most famous French olive-based dish is the [tapenade](#) spread made of olives, capers and anchovies. Another famous dish is [salade niçoise](#), which is traditionally made with Cailletier olives.

France also produces table olives. However, at 1,100 tonnes, its production is not sufficient for the domestic market. The leading production region is Occitanie, where mostly green olives are processed. The second-largest region is Auvergne-Rhône-Alpes, where mostly black olives are processed. The Picholine variety is the leading variety of green table olives, while black olives are mostly the Tanche, Cailletier and Grossane varieties. Despite its limited production, France has five PDO table olive types.

Around 60% of table olives in France are sold through the foodservice segment. The remaining 40% are sold through retailers. Green olives are the most popular among consumers and represent 70% of total consumption. French consumers want convenience. This is reflected in the prevalence of pitted olives over whole olives. Many table olives are sold as non-branded from the fresh counters in supermarkets. [Rungis International Market](#) is a large marketplace for the import and wholesale of table olives.

Most packed products are sold under the private labels of the leading retail chains: [Carrefour](#), [Leclerc](#), [Intermarché](#) and [Auchan](#). Independent brands include [Tramier](#), [Crespo](#) (by Comolive), [Delieuze](#) (by Brousse Vergez produced in Morocco), [Menguy's](#), [Barral](#), [Barnier Olives](#) and [Croc'Frais](#).

Figure 7: Green and black table olives with spices by Croc'Frais



Source: [Olives à la provençale poivrons piments](#), by [didiERG](#), per [Open Food Facts](#), under the [CC BY-SA 3.0 license](#)

#### Tips:

Search the [members database](#) of food cluster (FEDALIM) for contact details of table olive importers in France (in French). Click on “adherents” and then select “olives” in the drop-down menu under “Rechercher par produits”.

Visit the website of [France Olive](#), the [French olive interprofessional association](#) (in French) to learn more about the French olive industry.

## Germany: A major buyer of organic table olives

German imports of table olives have decreased at an annual rate of 0.7% since 2019, reaching 74,700 tonnes in 2023. Spain is the leading supplier with a 46% share, followed by Greece (29%), Türkiye (13%) and Italy (4%). Imports from Türkiye are growing fast. They increased from 23,000 tonnes in 2019 to 34,500 tonnes in 2023.

Germany is the largest market for Turkish table olive suppliers; Turkish people make up the largest single ethnic minority in Germany. There is a well-developed line of supply through ethnic supermarkets. Of the emerging suppliers, Egypt and Morocco are important players.

Most table olives sold in Germany are sold under private labels. The most important are Baresa (by [Lidl](#)), Gartenkrone (by [Aldi Süd](#)), Casa Morando and GutBio (by [Aldi Nord](#)), Aro (by [Metro Cash & Carry](#)), REWE Beste Wahl, REWE Feine Welt and REWE Bio (by [REWE](#)), and Edeka and Gut&Günstig (by [Edeka](#)). The leading independent brand is [Feinkost Dittmann](#). There are several other brands, such as [Theodor Kattus](#), [Gaea](#) (Greek brand), [Krini](#) and Adria (by [Paul M. Müller](#)). Significant quantities are also sold through Turkish supermarkets under private labels (such as [Marmara](#)) or own brands (such as [Ikram](#)).

Figure 8: Freshona green and kalamon table olives sold by Lidl



Source: [Autentika Global](#)

The organic food market in Germany is the largest in Europe. According to the German Federation of the Organic Food Industry (BÖLW), [sales of organic food in Germany rose by 5%](#) (link in German), reaching €16.1 billion in 2023. The food retail sector increased its organic sales by 7.2%, to €10.8 billion. German consumers are willing to pay a premium for organic table olives.

Many organic table olives in Germany are sold under the 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 than conventional table olives.

Tip:

Find German traders of table olives on the websites of the specialised German Association [Waren-Verein](#) and in the [German company directory](#) Wer liefert was.

## United Kingdom: A market with a rising consumption of table olives

Table olive imports into the UK increased at an average annual rate of 7.9% in volume between 2019 and 2023. This was the fastest growth rate among the largest European importers. The UK's imports of table olives reached 45,300 tonnes in 2019, at a value of €118.7 million. More than half (55%) of table olive imports were from Spain, followed by Greece (28%), Italy (7%), Türkiye (5%) and Morocco (3%). Of the emerging suppliers, Egypt has significantly increased its exports to the UK, while exports from Syria and Lebanon are not rising quickly.

The apparent consumption of table olives in the UK is increasing steadily, reaching 45,000 tonnes in 2024. The increasing consumption of table olives is driven by the popularity of the Mediterranean diet. The [International Foundation of Mediterranean Diet](#) is headquartered in the UK (London). The offer of table olives is wide and includes different varieties as well as olives prepared with various spices, marinades and stuffings. The most popular varieties are Manzanilla, Gordal, Hojiblanca, Kalamata, Halkidiki, Nocellara del Belice and Bella Di Cerignola.

Most table olives in the UK are sold as private labels of the retail chains, such as [Tesco](#), [Sainsbury's](#), [ASDA](#) and [Morrisons](#). Independent brands of table olives on the UK market are usually foreign brands. Examples are [Crespo](#) (a Spanish brand distributed by RH Amar), [Cypressa](#), [Fragata](#) (Spanish), [Gaea](#) (Greek), [Epicure](#) and [The Real Olive Company](#). Many table olives are sold as unbranded in deli sections of supermarkets and food halls, with a wide range of marinades and stuffings.

Importers and traders of table olives in the UK include [RH Amar](#), [Gima](#), [Mansora](#), [Medfood](#) and [Village Quality Products](#). A few large producers have their own subsidiaries in the UK, such as the Spanish company [Angel Camacho](#). Many UK importers of table olives are specialised in the import of ethnic food.

Tip:

Visit the [Speciality Fine Food Fair](#) in London and the [Farm Shop & Deli Show](#) in Birmingham to meet potential buyers of table olives.

## Romania: Strong reliance on nearby Türkiye and Greece

Romania is Europe's fifth-largest importer of table olives by volume. In 2023, the total value of imports amounted to 37,600 tonnes. The IOC estimates that Romania's table olive consumption will reach 29,500 tonnes in 2023/24. Over the past five years, Romania's table olive imports have increased at an annual rate of 0.4% by volume. The largest individual supplier is Türkiye, which has a 49% market share. Greece trails in second place with a market share of 24%. Egypt has an 11% share of the Romanian market. Spain (7%) and Italy (2%) are also important suppliers. The next largest developing-country supplier is Syria, which boosted its supplies from 1 tonne in 2019 to 111 tonnes in 2023.

Greek brands sold in Romania include [Latrovalis](#), [Xenia](#), [Kaloudi](#), [Carpos](#) and [Iliada](#). Turkish brands include [Eker](#) and [Ece](#). Some importers of table olives in Romania import table olives from different origins (e.g. [Yunus](#), [Olivina](#)), while others focus on single origins, such as Greece (e.g. [Munthe Athos](#)) or Türkiye (e.g. [Defne](#)). One example of a local brand comes from the canned-food producer [Devero Impex](#). The company owns the brand Roddson, which offers a range of Greek olives.

Tip:

Ask the [Chamber of Commerce and Industry in Romania](#) for the contact details of Romanian table olive traders.

## Belgium: A large importer and trading hub

Belgium is the sixth-largest importer in Europe by volume. In 2023, the country imported 31,800 tonnes of table olives. Half of these imports were re-exported, while the other half was consumed domestically. Over the past five years, imports have increased by 1.7% in volume every year. Greece is the largest supplier, making up more than one-third of the total market share. Morocco (25%) and Türkiye (17%) follow in second and third place.

Belgium processes, packs and re-exports significant quantities of table olives. Most of these re-exports go to European buyers. The top 15 largest customers for these re-exports are all in Europe. The three largest buyers



are Germany (34%), France (26%) and the Netherlands (20%).

A large share of table olives in Belgium is sold under private labels by retail chains, such as [Colruyt](#) (Boni, Boni Bio and Everyday), [Delhaize](#) (Delhaize and 365), [Carrefour](#), [Aldi](#) and [Lidl](#). Independent brands include [Père Olive](#) (Belgian), [Crespo](#) (Spanish), [Sacla](#) (Italian), [Carbonell](#) (Spanish) and Brindolive (Moroccan origin, supplied by specialised ethnic importer [Mia International](#)).

Tip:

Search the Belgian food company directory [food.be](#) to find potential importers and processors of table olives.

## 4. Which trends offer opportunities or pose threats in the European table olives market?

Europe's growing consumer interest in table olives is the result of several driving forces. One of them is the growing awareness of the benefits of the Mediterranean diet. Other positive factors include trends surrounding healthy snacking and convenience in food consumption. Consumers are also increasingly aware of the dangers of ultra-processed foods and pay attention to sustainability in their food products.

The Mediterranean diet is widely promoted in Europe as a healthy alternative

Table olives are a significant part of the Mediterranean diet, which is widely recognised for its health benefits. [MEDIET4ALL](#), which recently received EU funding, aims to promote this diet. The project emphasises the diet's capacity to reduce the risks of cardiovascular diseases, dementia and obesity. The project also highlights the Mediterranean diet's sustainability, aligning with the EU's Farm to Fork strategy to reduce environmental impact.

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

UNESCO continues to support the Mediterranean diet as part of the Mediterranean's intangible cultural heritage. This means promoting its role in wellbeing and sustainable food systems. It also includes educational initiatives like the Week of Italian Cuisine in the World, which emphasises the health and cultural benefits of Mediterranean food ([UNESCO Med Diet](#)).

In 2023, Italy celebrated the 13<sup>th</sup> anniversary of the Mediterranean diet's inclusion in UNESCO's list of intangible cultural heritage. The country hosted several events, including the Week of Italian Cuisine in the World. The week showcased the health and cultural significance of the Mediterranean diet through workshops and culinary events.

Table olives have a healthy fat profile, with around [75% of the fats being healthy monounsaturated fats](#). They only contain moderate amounts of saturated fat (roughly 13%) and smaller amounts of polyunsaturated fat (around 10%). Studies consistently show increased consumption of monounsaturated fats to be associated with benefits for cardiovascular health. The low level of processing of table olives is attractive to consumers, especially as there is growing scrutiny surrounding the [harmful nature](#) of ultra-processed foods and drinks



(UPFDs).

Several national associations in Europe invest in the promotion of table olives. The European Union also supports the consumption of table olives through specialised projects, such as [Have an Olive Day](#) (Spanish project).

## Sustainability concerns can affect imports

As European countries focus on the sustainability of food production, suppliers from developing countries should take note. The sustainability of food products is a concern for importers and consumers, so suppliers should prepare accordingly. Keep an eye on your competition, the sustainability of their table olive production and how they prove their claims. Sustainability claims need to be easily verifiable and be backed up by facts and real effort.

Some of the key sustainability issues for table olive producers include soil erosion, rising water consumption, the generation of wastewater, chemical and fertiliser pollution, and damage to biodiversity. Erosion is the result of the combination of multiple factors, such as soil type, slope and unsuitable farming practices. While olive groves are not especially water intensive, the expansion of olive production can lead to water shortages. The fertiliser run-off from olive farms and overuse of chemicals can compromise production and water.

To support sustainable olive production, the EU funded the project [olive4climate](#) to increase the implementation of best practices and reduce climate impact. The project established a [standard for carbon credit certification](#) (PDF) generated from the sustainable management of olive groves.

Another project that specifically focuses on sustainable table olive production is [Life SOLIEVA](#). The project developed technology that enables the recovery and reuse of 30% of the salts contained in the brine. In addition, the project's technology allows for the recovery of 60% of the water and up to 42% of the polyphenols with a high antioxidant power. The project's [documentation is accessible](#) for table olive producers.

[Berrak](#) is a Turkish supplier of gourmet table olives produced with [a focus on sustainable production](#). The firm supports local farmers in the Aegean and Mediterranean regions. It also encourages its farmers to use smart irrigation. The company itself is also trying to reduce its impact on the environment. Berrak produces 3.2 GWh of electricity annually from its Zeytursan photovoltaic plant. The firm has also published its '[green commitments](#)' to support the United Nation's Sustainable Development Goals.

### Tips:

Get involved [with the MEDIET4ALL project](#). The project aims to engage all end users, small and medium-sized enterprises (SMEs), and innovation clusters in the food industry, for product-to-market approaches and business model formulation.

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

Consult the [OLIVE4CLIMATE public library](#) to get ideas about sustainability practices that may be useful for you.

Download Life SOLIEVA's [decision support tool](#) (Excel) to manage your liquid waste in table olive production. Consult their [video tutorial](#) to use the tool properly.

Participate in international competitions if you aim to place your table olives in the premium segment. You can find a list of award-winning table olives from international competitions at the [London International Table Olives Competition](#).

[Autentika Global](#) carried out this study on behalf of CBI.

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