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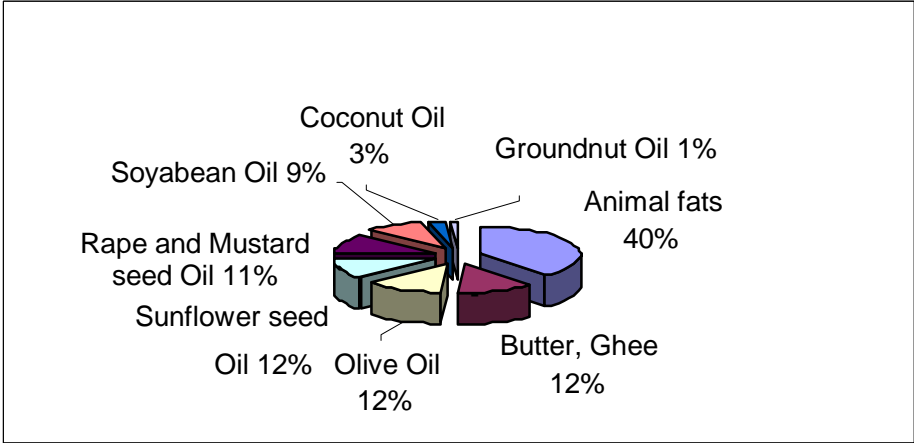
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# 1 A European outlook for the olive oil market

## 1.1 Edible oils and fats

The edible oils and fats market in Europe has been dominated for long by the extensive use of animal fats (40%) and butter (12%), while the main fluid edible oil used for food consumption are Olive oil (12%), and Sunflower seed oil, Rapeseed oil as well as Soybean oil with comparable market shares (figure1-1).

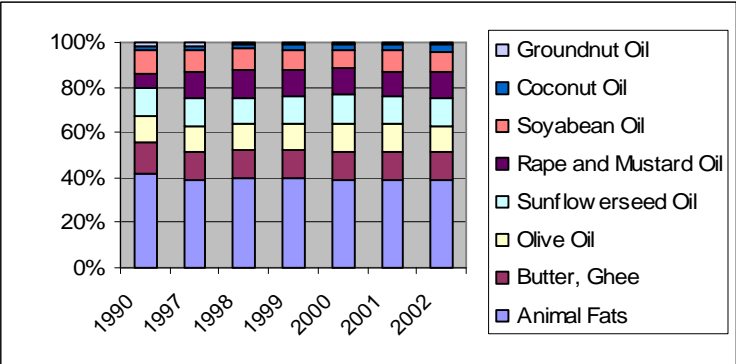
Figure 1-1 Main edible oil and fat consumption, in the EU-15 in 2002



Source FAOSTAT, FAO, 2005

Rising consumer health concerns though, has led to a steady decline in the sale of fats as well as some oils (such as palm oil) for food consumption. During 2002, per capita consumption of oils and fats in Western Europe decreased by 5% and 9% respectively. While consumption of oils and fats generally declined, olive oil and certain vegetable and seed oils performed better.

Figure 1-2 Edible oil and fat consumption trends, in EU (15) in volume terms



Source FAOSTAT, FAO, 2005

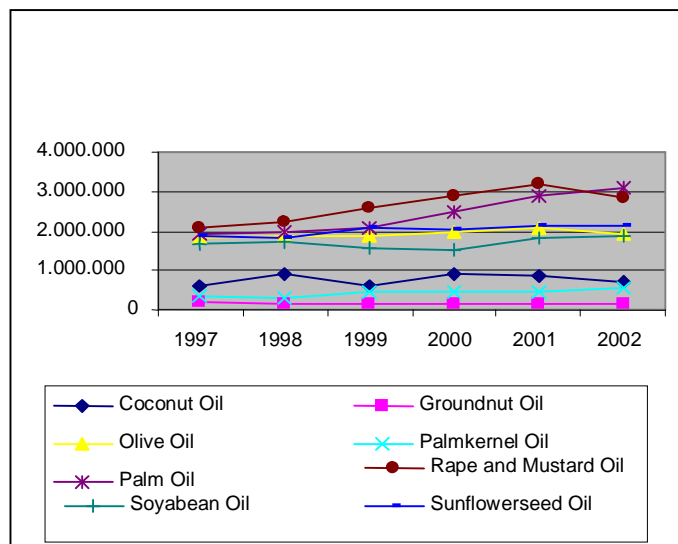
Demand has been stable in the EU market over recent years, with a relative stability of market share composition between different oils, with the exception of palm oil which has appeared a strong increase, due to its higher demand for industrial use. According to FAO data, olive oil consumption in the EU (15) has increased from 1.804.650 tones in 1997 to 1.949.209 in 2002.

Main products of the vegetable oil industry in the EU (besides olive oil), are soybean oil, palm oil, rapeseed oil, sunflower seed oil, peanut oil (groundnut oil), coconut oil, and palm kernel oils. These oils are easily interchangeable both in terms of food consumption and industrial use, since

they have similar physical and chemical characteristics. Among these oils, soybean and palm oils constitute more than 40% of the world production and exports.

In the European vegetable oil market, rape seed oil and palm oil are experiencing strong market growth, as food makers continue to turn away from animal fats in favor of vegetable alternatives. The same trend is observed but to a lesser extent, in olive oil and Soya been oil consumption

**Figure 1-3 EU-15 Trends in the vegetable oil market (domestic supply in 1997-2002)**



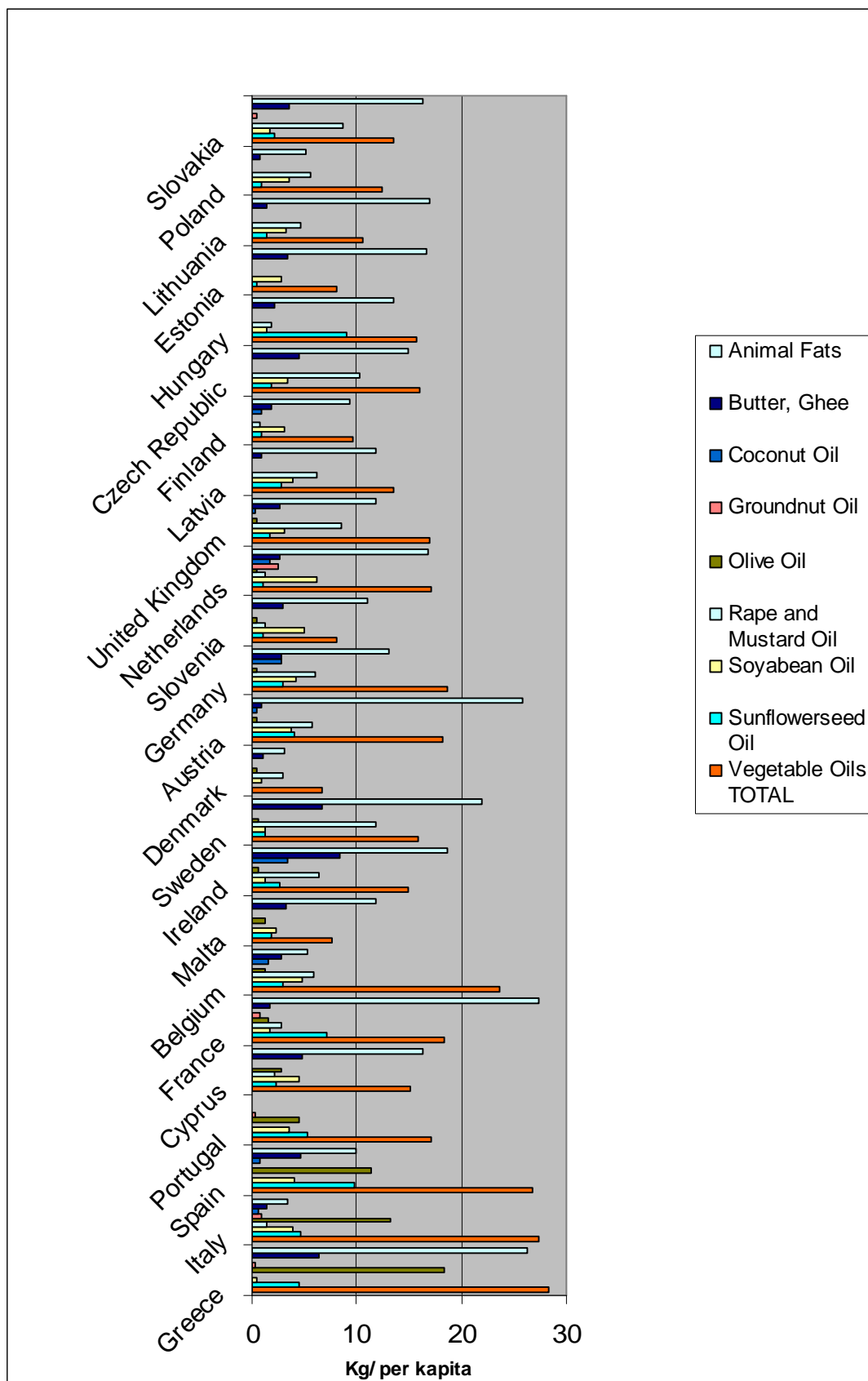
Source FAOSTAT, FAO, 2005

The composition of edible oils and fats consumed in each of the EU countries, presents considerable variation, and while most of different types of oils are consumed to some extent in each country, the widest variations concerns olive oil consumption, where a very high level of consumption is observed in the producing countries (the highest in Greece with average per capita consumption reaching 19 kg, followed by Italy, Spain, Portugal, Cyprus and then France, while Northern European countries present an average per capita consumption of less than 1 kg. (figure 1-4).

Nevertheless, significant variation is observed in the consumption of other types of oils as well, such as in the case of rapeseed oil, where we observe a per capita consumption of 11,77 kg in Sweden, while it is virtually non-existing in the eating palette of a number of EU countries (Greece, Portugal, Malta and Hungary).

Similarly, a distinct difference in average per consumption is observed in animal fats and butter consumption. France is on the top of the list with the highest animal fat consumption, with 27.34 kg, while on the other end of the scale Denmark has an average per animal fat consumption of 3, 13 kg. As for butter, a big difference exists between the 8.36 kg of Ireland and the 0.84 kg of average per capita butter consumption of Poland (figure 1-4).

Figure 1-4, EU-25, Edible oils and fats consumption in 2002

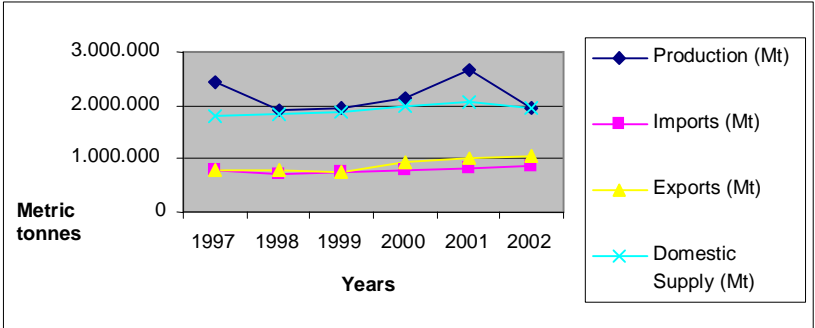


Source FAOSTAT, FAO 2005

## 1.2 The olive oil market

The European olive oil market has enjoyed a growth rate of above 3 per cent for the past 5 years, as the total volume supplied in the EU (25) market has raised from 1.804.650 (Mt) in 1997, to 1.982.200 (Mt) in 2003.

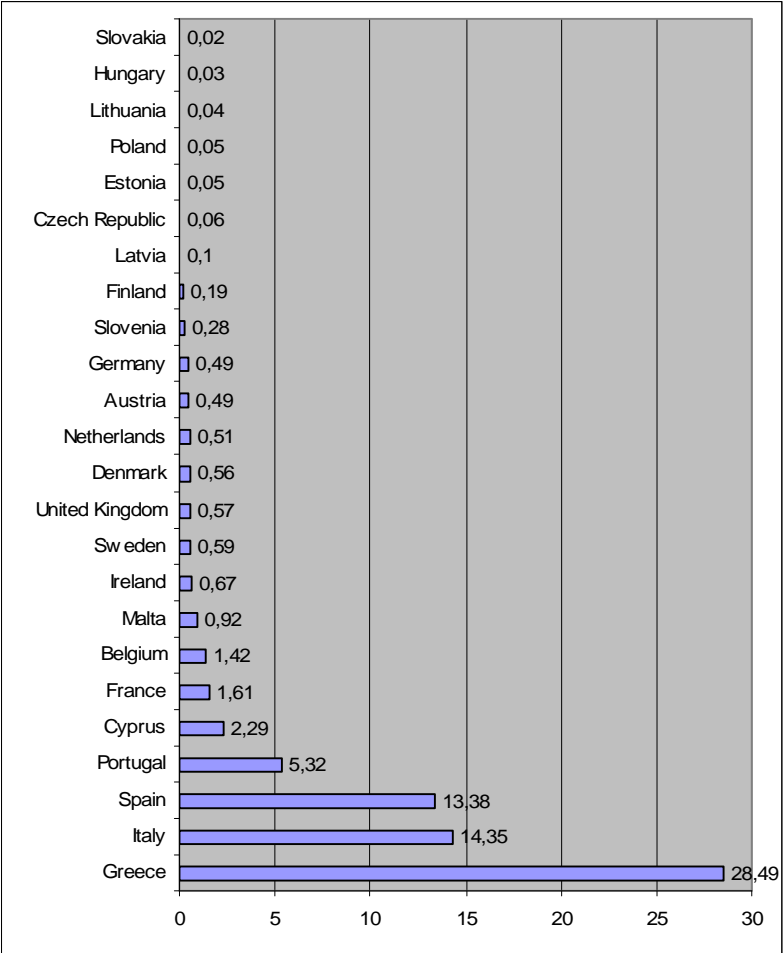
Figure 1-5, Trends in EU olive oil production, imports, exports and total supply



Source FAOSTAT, FAO, 2005

The basic characteristic of the market though, is the huge divergence of the size of olive oil market and the subsequent average per capita consumption between them, as the highest olive oil quantity available (per capita) is observed in the Greek market with 28.49 kg in 2002, while the lowest per capita olive oil supply, concerned Slovakia with just 2 grams (0.02 kg).

Figure 1-6, olive oil domestic supply in EU-25, in 2002



Source FAOSTAT, FAO, 2005

As we can observe from IOOC data (table1-1), in the latest period (2000/01- 2004/05), average EU production was 2.187 thousand tones, a sharp rise of 60%, compared to the average of the same period in the previous decade, i.e. 1990/01-1993/94 when average production was 1366 thousand tones. Due to the concentration of the market mainly in the EU countries, a similar trend is observed to world olive oil production average figures.

Estimates for the figures of olive oil production of the near future, indicate a further rise, both of world production and consumption of 19% from current figures to the ones concerning the 2020/11 period (IOOC, OLIVAE, 2005).

Comparable increasing trends in the production of olive oil, is observed at the main producing countries of the EU (Spain, Italy, Greece) and to the Mediterranean countries outside the EU (Syria and Turkey), while production figures indicate a stabilization for Tunisia.

**Table 1-1 Historical figures and future estimates for world production and consumption of Olive Oil,**

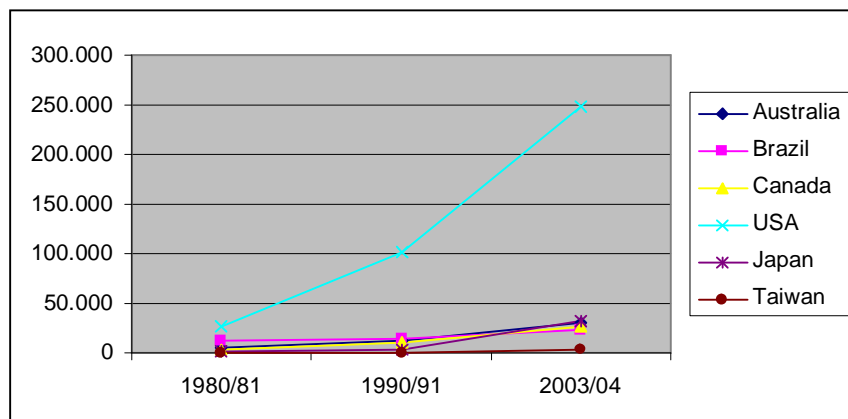
Producing countries	Average 1990/91-1993/94	Average 2000/01-2004/05	Estimate 2010/11
Spain	589	1.118	1.398
Italy	448	649	815
Greece	293	386	474
France	2	3	5
Portugal	33	30	32
Total EU-15	1.366	2.187	2.726
Algeria	21	35	49
Argentina	8	9	9
Cyprus	2	6	8
Croatia		5	4
Israel	5	6	6
Jordan	10	23	30
Lebanon	5	6	6
Morocco	41	58	73
Palestine	13	14	10
Syria	73	141	179
Tunisia	176	125	125
Turkey	80	120	150
Other countries	28	24	19
World production	1.828	2.763	3.399
World consumption	1.881	2.708	3.293

Source: Olivae (IOOC), June 2005,

As a result of continuous and sustained promotion efforts and wide publicity for the positive health effects of olive oil consumption, import demand for olive oil in countries with no or limited production of olive oil, has raised significantly during the last 25 years. The most significant import market is the US market, where net imports have presented an almost tenfold increase, starting from a figure of 26.171 tonnes in 1980/81 and reaching 248.184 tonnes in 2003/04.



**Figure 1-7, Trends of olive oil imports in the global market**

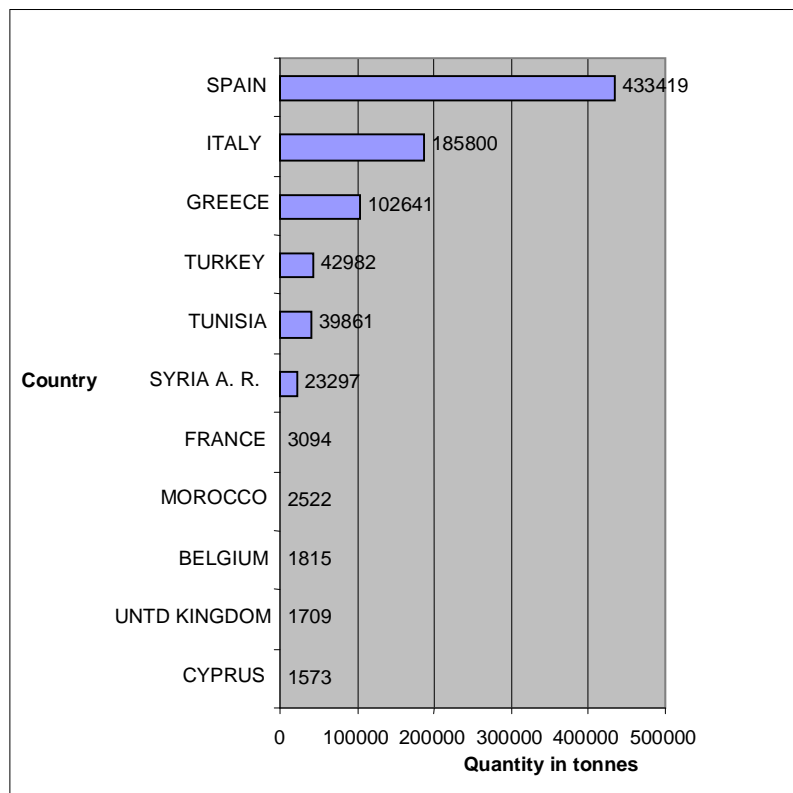


Source: Olivae (IOOC), June 2005,

### 1.3 Trade trends in European olive oil market

The EU is the leading world producer (by 80% market share) and consumer (by 70% market share) in the global olive oil market. Besides the main EU countries (Spain, Italy and Greece) which collectively account for 67% of world olive oil exports, the other major olive oil producers (and consumers) are Tunisia, Turkey, Syria and Morocco, with a collective world market share close to 20%. A large part of the Spanish and the largest of Greek virgin olive oil exports are destined for the Italian market (intra EU exports).

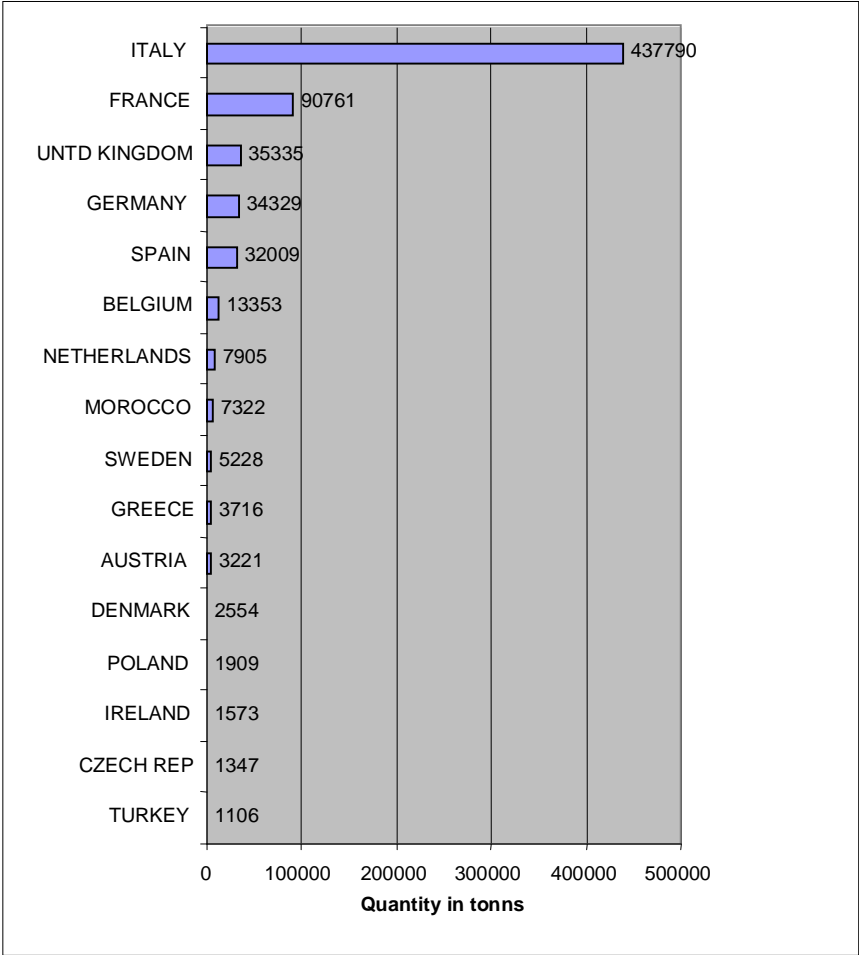
**Figure 1-8, Exports of virgin olive oil by EU and Mediterranean countries in 2003**



Source: PC-TAS, 2005

Despite the fact that Italy appears among the top world exports in olive oil, due to a combination of extended Domestic market needs and the limitations of domestic production, it also leads EU (and world) imports of virgin olive in particular.

**Figure 1-9 Virgin olive oil imports in EU and Mediterranean countries, in 2002**



Source: PC-TAS, 2005

## **1.4 Extra EU Olive oil import trade with Mediterranean countries**

In the Maghreb countries (the *Arab Maghreb Union* was established in 1989 including also *Mauritania and Libya, besides Morocco, Algeria and Tunisia* which have a higher significance in the olive oil market), the main vegetable oil produced is olive oil, of which Tunisia is a significant exporter while production hardly covers needs in Algeria and Morocco. Morocco has developed a significant crushing industry and is an oilseed importer. Although limited, market liberalization is expanding in all these countries, as the degree of direct intervention of the State in the market had been high in the past, but gradually decreasing

The main agricultural policy concerning olive oil in these Maghreb countries, is similar to the plan that has already been developed in Tunisia. Namely to further develop adequate production and commercial capacities so as to export olive oil in the global market, according to international standards, through the application of the necessary quality measures to achieve this objective. This is considered as a lucrative revenue generating activity, as olive oil will be offered to prices corresponding to local market levels, while at the same time different price levels will be maintained for the domestic markets, adjusted to local conditions.

Such a policy is already adopted in Tunisia, while Algeria aims to follow suite on a same track and Morocco as well has set up an ambitious plan for the development of oleo culture, by setting a target of one million hectares of olive plantations by 2015, tripling production and doubling exports in comparison to current levels. The supply chain will also be improved in technical and qualitative terms and marketing expertise will be also elaborated. It is argued that the traditional small scale and fragmented type of farming practiced in these countries can be further developed in line to the aforementioned policy so as to achieve the targets, while also maintaining the traditional character and role of farming.

As far as the EU (external) trade with Mediterranean countries is concerned, Tunisia has traditionally been the main olive oil exporter to the EU, as it accounted for 71% (in 1995) for all olive oil (extra) imports. Nevertheless Tunisia's olive oil exports to the EU reached a peak in 1999, as gradually Turkey and Syria had been gaining ground. As a result, in 2003 Turkey accounted for 40% of (extra) EU olive oil imports, while the respective figure for Syria had reached 20%.

### **1.4.1 Tunisia**

Tunisia constitutes an important olive oil exporter in the order of 100 000 tonnes / per year (although the respective figures fluctuate quite strongly between 20.000 tonnes in a bad year (such as 2002) and 200.000 tonnes in a "good" year (2004). (J. L. Benassi , M. Labonne 2004)

In 2004, Tunisia was the largest exporter of olive oil in the world, with some 200.000 tonnes exported in 2003/04 (while harvest had reached some 280,000 tonnes). With a limited number of Tunisian brands (which are almost exclusively destined for the domestic market), it is not surprising that most produce is exported in bulk form. Most of that exported olive oil, is shipped either to Italy or Spain (72% of Tunisian export is bought to Spain and 26% to Italy. The rest is exported to American and Asian countries) where it is either processed (refined) or just blended with local oil (or from oil originating from other regions as well), and then sold with Italian- or Spanish labels as a product of Italy or Spain respectively (at much higher prices, with significant mark-ups, of course).

In 2005 however the Tunisian Ministry of Agriculture launched a three year plan aiming at moving gradually away of the current system of selling olive oil directly to wholesalers/ exporters in bulk at low prices, and instead increase the percentage of olive oil that is conditioned in Tunisia

(with a Tunisian brand) and then sold to wholesalers from the current 2%, to a figure between 10% and 20% within three years. The project will be financed by a 5% export tax (levy) in order to undertake more marketing activities by integrating the Tunisian brand into higher value added market niches, through distribution international distribution chains.

To undertake such a quality improvement strategy, the Tunisian Olive Oil sector will definitely need better organisation, given that olive production is small scale and fragmented. There are some 1700 oil presses in the country, with 44 downstream producers (packers, bottlers, intermediates) including the National Olive Oil office (“Office Nationale de l’Huile”), which guarantees minimum levels of export prices, aiming to protect farmers’ income. Besides the aforementioned objective, the State intervention is principal in the edible oils market, aiming also at maintaining price balances among the various types of edible oil, in such a way that less favoured groups of consumers have access to these products as well (Benassi J.L. et al 2005).

Quality needs to be raised and the production process modernised. In 2004, only 100 (out of 1700 presses) had signed up to the so called “mise à niveau” quality upgrading programme, while experts view the harvesting and pressing methods applied in Tunisia as traditional and inefficient when compared to the EU standards at least.

## **1.4.2 Turkey**

Turkey exported 85,000 tonnes of olive oil in 2001 ( IOOC/ED) which were comprised of 59% in bulk, 21% in barrels and 20% in boxes. Thus, more than half of exports were in bulk form, and Turkey's most important export markets are Italy, Spain and the USA.

Turkey is a producer as well as a consumer, as is the case of all countries producing the olive oil, and consumes about 60,000 tonnes of olive oil per year. Per capita, Greece consumes 21 kg of olive oil, Italy consumes 11 kg, Spain consumes 10 kg, Tunisia consumes 10 kg, Syria consumes 6.2 kg, Portugal consumes 5 kg and Turkey consumes 1 kg, by making it the smallest consumer of olive oil among producing countries.

In Turkey, like in Tunisia, olive cultivation methods (at least agricultural methods applied) remain rather traditional. Absence or disruption of irrigation, pruning and fertilization and combination of olive cultivation with animal husbandry (grazing sheep), as well as traditional harvesting methods (using long poles but absence of nets) are among the basic problems of olive cultivation in Turkey.

The world’s largest producer is Spain and it accounts for half of all world production. It can sell only 30% of its produce as branded, canned and in a small package. This figure is 8% for Greece. For Turkey, it is around 8-10%.

‘Taris’ ([www.taris.com.tr](http://www.taris.com.tr), olive and olive oil union of co-operatives, in Izmir, the Aegean region of Western Turkey) is the largest olive oil producer (besides other activities in oilseed crushing, fig and other fruit and nut processing, and marketing), as it exports olive oil to 37 different countries. Due to difficulties faced with high taxation in EU, ‘Taris’ has focused on USA, Canada, Japan, Russia, and Australia. To achieve market penetration , ‘Taris’, doesn’t only rely on traditional exporting methods of bulk quantities to foreign importers but also, establishes and runs direct marketing networks, trough its own retail stores and franchise operations and direct sales to restaurant (600 Italian restaurants) in important markets such as the US and Japan.

There are 33 cooperatives and 27,000 producers who belong to Taris Olive and Olive Oil Agricultural Sales Coopertives Union. In addition, the 28 modern olive pressing facilities, 14 pickling works, independent olive producing facilities, an AR-GE department, an internationally

accredited laboratory serve for delivering most quality products and better customer services with the international quality licenses of ISO9000 and ISO9002.

Another olive oil (similar, but more moderate scale) producer and exporter is the ‘Marmarabirlik’ union of co-operatives (consisting of 8 first degree co-operatives with 30.607 members producing olives and olive oil), in the Bursa, North-western region of Turkey ([www.marmarabirlik.com.tr](http://www.marmarabirlik.com.tr)). Another smaller union of co-operatives is the “Gyneydogubirlik” with three co-operatives and 4,945 members, while another 6,292 producers process and market their olive oil through 37 small scale co-operatives.

The Associations of co-operatives have a widespread organisational network in the olive cultivation regions, through which, they provide support by selling inputs (credit as well), while at the same time they have collection centres for olive oil. By 1992/93 the number of crushing mills was reported to 1005, but by 2005 only 290 mills were reported with five or more employees, with a total capacity of 343,000 tonnes. The Turkish olive oil supply chain is also supported through 15 refining facilities, 18 facilities processing and producing olive pomace oil, and 100 olive oil bottling and canning facilities.

### **1.4.3 Syria: an ambitious new project for “High Quality Olive Production and Processing”**

Olive is a major crop in the agricultural sector in Syria, since it is the main source of income for a large number of small and medium farmers and the most important commodity in the economy of many (marginal) geographic areas. The olive sector contributes to foreign exchange earnings. "Syria ranks the world's 5<sup>th</sup> country in producing olive oil (after Spain, Italy, Greece and Tunisia) and exportation of olive oil increased recently to 35,000 tonnes in 2005 from 5,000 tonnes in 2002. Olive oil exports are expected to reach 100,000 tonnes in 2010, as part of a big scale integrated project that has been launched by the Syrian Government, with the contribution of FAO and a multidisciplinary team of experts, know-how and support from Italy, with objective to improve a sustainable, high quality olive and olive oil production and processing sector in Syria.

For the time being the olive sector suffers from a series of constraints so much so during the cultivation phase, such as: unknown potential of local varieties, unstable yield due to alternate bearing, inadequate pruning and inadequate disease and pest management methods, as well as during and after harvest, namely: traditional harvesting method, lack of modern processing and packing techniques, combined with absence of quality control methods and equipment (laboratories). Olive oil quality is negatively affected by the small number of big centralized processing facilities, leading to harmful delays in processing.

Syrian olive oil export structures are weak with a limited number of small scale exporters, which are used to handle bulk quantities for olive oil exports, directed to importers in other countries. As result there is no central organisation to coordinate and support export marketing, thus foreign marketing skills are limited.

## **1.5 Trends in the European olive oil market**

Both long term historical figures for world olive oil production and consumption reveal a gradual expansion of the world market and expectations for the foreseeable future are similarly bright as well (Luchetti, 2002). Such favourable market conditions, create opportunities for the traditional producing countries of the EU, but also to the non-EU member countries of the Mediterranean region. Not all market conditions should be interpreted as opportunities though, as consumer needs and market requirements (in relation

to food safety and quality regulations), impose also grate restrictions to producers and marketers of olive oil (Mili et al, 2001).

Many smaller producers and exporters, establish new export trade activities to export high quality olive oil under their own brands.

Consumers want to know the origin of their products and demand more guarantees for the product quality. Currently the majority of the small and medium importers bring in the European market already packaged and labelled olive oil (at the export origin) and distribute it mainly to the food retail.

A recently observed consumer trend, is the increasing demand for differentiated olive oil with different aroma (oregano, basilicum etc.) .

A driving force for higher olive oil consumption, is its healthier profile (in association with the upsurge of the Mediterranean diet by European consumers), leading to increased (per capita) consumption of olive oil and the decreased consumption of other edible oils and fats (Grigg D., 2001).

Major players in the food retailing are the discounters with a share of about 60 % , but specialty stores trough direct supply chains are also increasing their turnover.

The largest share of olive oil is marketed under retailer brands (private labels) of either the discounters or the importers, but often of dubious quality (due to unknown origin and characteristics of the content). Although some private label olive oils are often tested and judged as of superior quality/ value ratios, at the same time it often happens that other private label olive oils are found at the lower end of the quality/ cost ratio. As a result, consumers often mistrust private label products and producers or marketers of those products should provide better information and a more clear communication of product attributes with the consumer base.

Labelling has to be simplified in order to avoid “free-rider” problems and improve market information for consumers.

Opportunities for producers from Mediterranean counties arise since consumers are increasingly more sensitive on olive oil origin and quality assurance issues. To take advantage of such market opportunities though, producers and their organisations in Turkey, Syria, Tunisia and Morocco, should further develop their quality management and international marketing skills, so as to meet the strict requirements of traders and retailers of international supply chains.

Recently revised EU legislation on food products (regulation EC 178/2002, The General Food law), which among other stipulations also introduces obligatory provisions for traceability, might help small scale olive oil producers to promote their PDO or in any case single extract types of olive oil, against blended olive oil products that are market at a massive scale by multinationals.

Since diverging market segments evolve as a result on the increasingly distinctive product attribute combinations of some consumer segments, we could see more small and medium olive oil producers with better marketing skills (and olive oil coming from protected denomination regions), focusing on the high-end segment, while producers from lower production cost based regions, focusing on cost leadership marketing strategies for the lower-end market segment.



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## **Supply chain analysis of the olive oil Market in The Netherlands**

By

Prodromos Kalaitzis and Gert van Dijk

## 2 The Netherlands olive oil supply chain

### 2.1 Introduction

The Netherlands has played an important role historically in the development of the vegetable oils and fats industry and import trade, thanks to the formation of the Dutch Unilever (which later developed to a multinational firm that leads the sector up until nowadays), that was established in the country in the beginning of the 20th century oils and fats. It all began by (1817-1880), when the French chemist Hippolyte Mège Mouriès invented the ‘artificial butter’ (margarine) to be used for the troops of Napoleon III. This invention was further elaborated by engineers of the Dutch company Van den Bergh & Jurgens (which was established in Rotterdam in 1891 and drastically improved the production process), paving the way for the subsequent development of the company to the multinational Unilever, though a merger with the ‘Lever Bros’ company that was producing soap. Since then, The Netherlands developed to a large scale importer of vegetable oils and fats.

In relation to the edible oils market in The Netherlands nowadays, the major market trends refer to the decreasing bread consumption (or consumption of different type of bread), and consequently decreased use of margarine as a spread, but also decreased use of margarine for baking or frying when cooking at home. Although margarine replacement products have been introduced to the market aiming to balance the market, the total market for this group of products has significantly declined.

In order to respond in these trends, most processing firms have introduced olive oil products in their assortment. As a result, on the one hand, the range of products that contain more olive oil (having replaced other types of oils and/or fats) has increased, while on the other hand olive oil penetration has increased considerably in recent years and all general food retailers continue to expand their olive oil assortment, with more branded and private label olive oils, while at the same time more olive oil is stocked by specialist stores as well.

### 2.2 The demand side

Dutch domestic consumption of fats and oils, margarine and butter, has – after a steady decline since the early 1990’s – stabilised in the year 2000 at an average quantity of approximately 21.5 kg per capita (MVO, 2003).

The domestic use for all oils and fats has steadily increased from 1997 to 2003.

**Table 2-1 Trends in animal fats (AF), butter (But.) and vegetables oils (VO), in 1000 tonnes in The Netherlands**

	1997			2000			2003		
	AF	But.	VO	AF	But.	VO	AF	But.	VO
Production	485	134	1,252	558	126	1,374	464	117	1,157
Imports	650	94	1,181	346	86	2,114	380	126	3,005
Exports	698	163	2,156	376	119	2,130	562	233	2,707
Domestic use	434	35	688	470	33	1,379	309	35	1,514
feed use	429			119			165		
<b>food use</b>	<b>129</b>	<b>35</b>	<b>297</b>	<b>150</b>	<b>33</b>	<b>263</b>	<b>143</b>	<b>35</b>	<b>281</b>

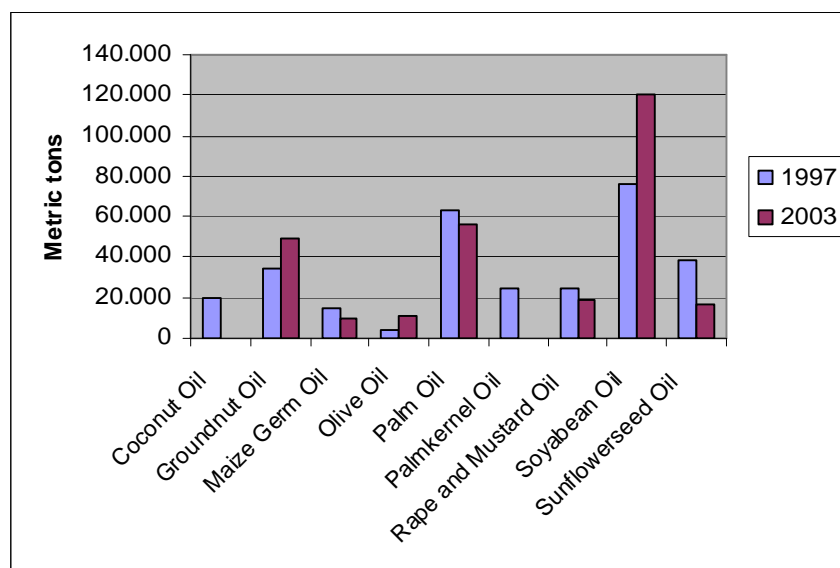
Source: FAOSTAT 2005

Olive oil constitutes an exclusively import product for The Netherlands (as in all other North European countries as well). The highest proportion of imports concerns virgin olive oil. Dutch



consumers have spend in 2002, 34 million euro for olive oil. Supermarkets raised their olive oil sales by 25%. Olive oil consumer penetration (percentage of the Dutch consumers who use olive oil), has reached 40%. Their average consumption is two kilos per year. The rise in olive oil consumption happens as consumers replace margarine for it. Olive oil consumption rises quickly in the Dutch market, as consumers replace margarine with olive oil. Producers and retailers expect that this trend will continue with a further doubling of the current turnover in two years. Olive oil is considered as a healthier product, thus gaining ground in the expense of other vegetable oils. When compared to the consumption in the beginning of the nineties, consumption was risen by more than six times. (Het financiele dagblad, 09/2003)

**Figure 2-1, Trends in vegetable oil consumption in the Netherlands**



Source FAOSTAT, FAO, 2005

Although olive oil consumption has increased in The Netherlands since the early nineties, average per capita consumption remains low, at 0,46 kg in 2002 (Table 2-2, FAO), while at the same time animal fat consumption, remains at a high level with average per capita consumption at 16.83 kg.

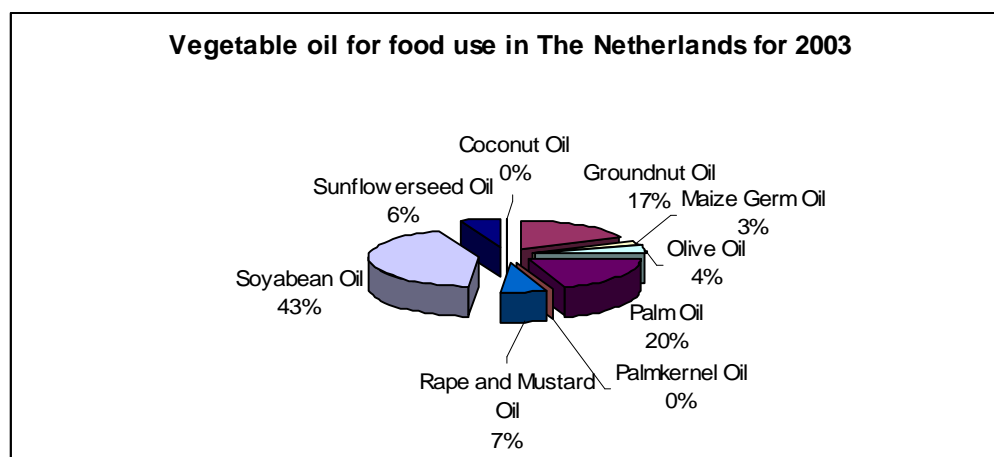
**Table 2-2 Composition of average per capita consumption of edible oils and fats in The Netherlands in 2002**

Year: 2002	TOTAL Vegetable Oils	Sunflowerseed Oil	Soyabean Oil	Rape and Mustard Oil	Olive Oil	Groundnut Oil	Coconut Oil	Butter, Ghee	Animal Fats
Netherlands	17.15	1.09	6.26	1.23	0.46	2.49	1.74	2.62	16.83

Source FAOSTAT, FAO, 2005

Despite the rapid increase of olive oil consumption in the Netherlands over the last years, due to the fact that this trend began relatively recently from a very low level, currently, olive oil occupies a 4% share in the market of edible oils (excluding edible animal fats and butter), of The Netherlands

**Figure 2-2, Composition of vegetable oil consumption in The Netherlands in 2003**



Source: FAOSTAT, FAO , 2005.

In the same period the per capita consumption has also increased from 0.08 kg to 0.51 kg (according to PC-TAS data and own calculations), which constitutes a 637% rise (table 2-3).

**Table 2-3 Trend of olive oil consumption in the Netherlands**

	1991	1992	1995	1996	1997	1999	2000	2001	2002
Consumption in kg/capita	0.08	0.10	0.15	0.15	0.24	0.47	0.38	0.48	0.51

Source PC-TAS, 2005 (own calculations)

A sharp increase of olive oil imports in The Netherlands continues also in recent years and the increase observed in the period 1999 to 2003 is calculated to 70% (table 2-4).

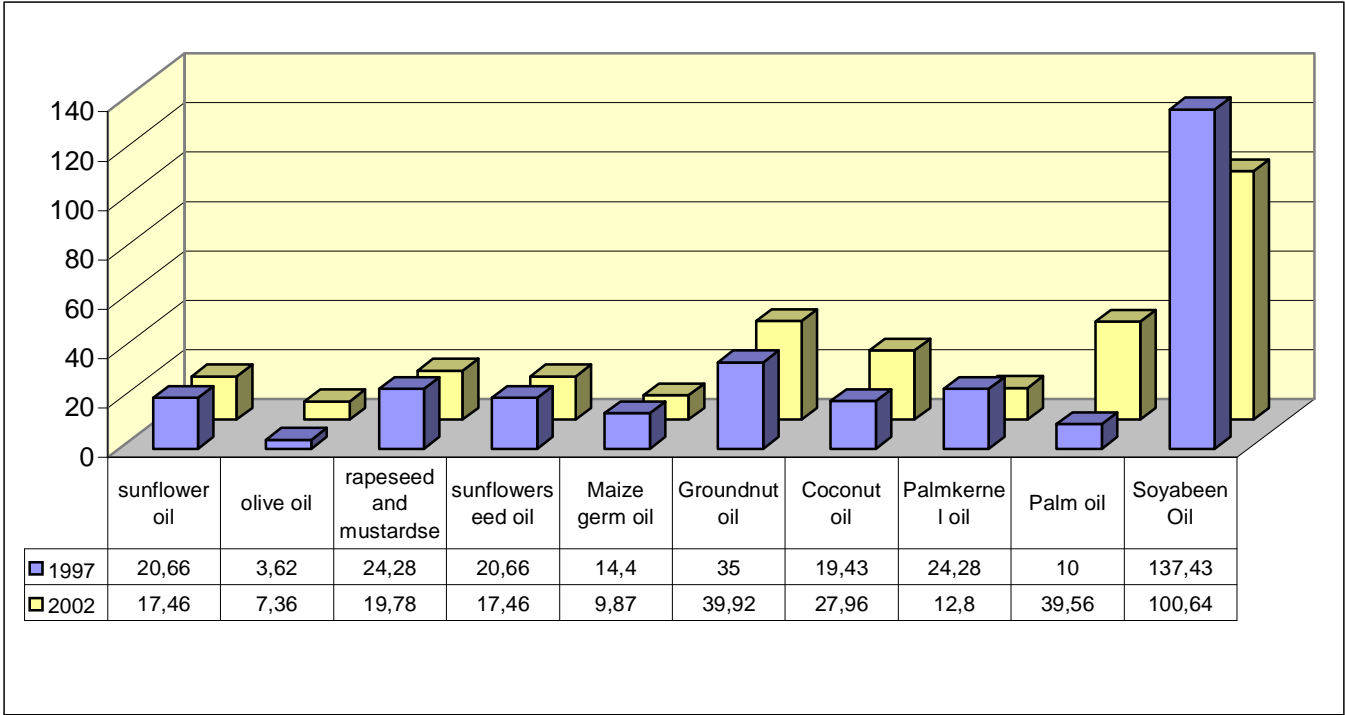
**Table 2-4 Trend of olive oil imports in The Netherlands**

	1999	2000	2001	2002	2003
Olive oil imports in 1,000 t	7841	9135	9174	12291	13260

Source PC-TAS, 2005

Although a significant rise (almost doubling) in olive oil consumption is observed in the Netherlands over the period 1997 to 2002 (figure 2-3), an even sharper rise is observed for palm oil consumption, as it almost quadrupled in the same period. The increase in palm oil consumption (especially when accompanied oils by an almost equal decrease in soybean consumption), can be associated with the recent campaign which is undertaken by the vegetable oil institutions of the industry in The Netherlands to improve the quality of frying by using better quality frying oils.

**Figure 2-3 Edible oils consumption trends in The Netherlands (total volume in thousand tonnes)**



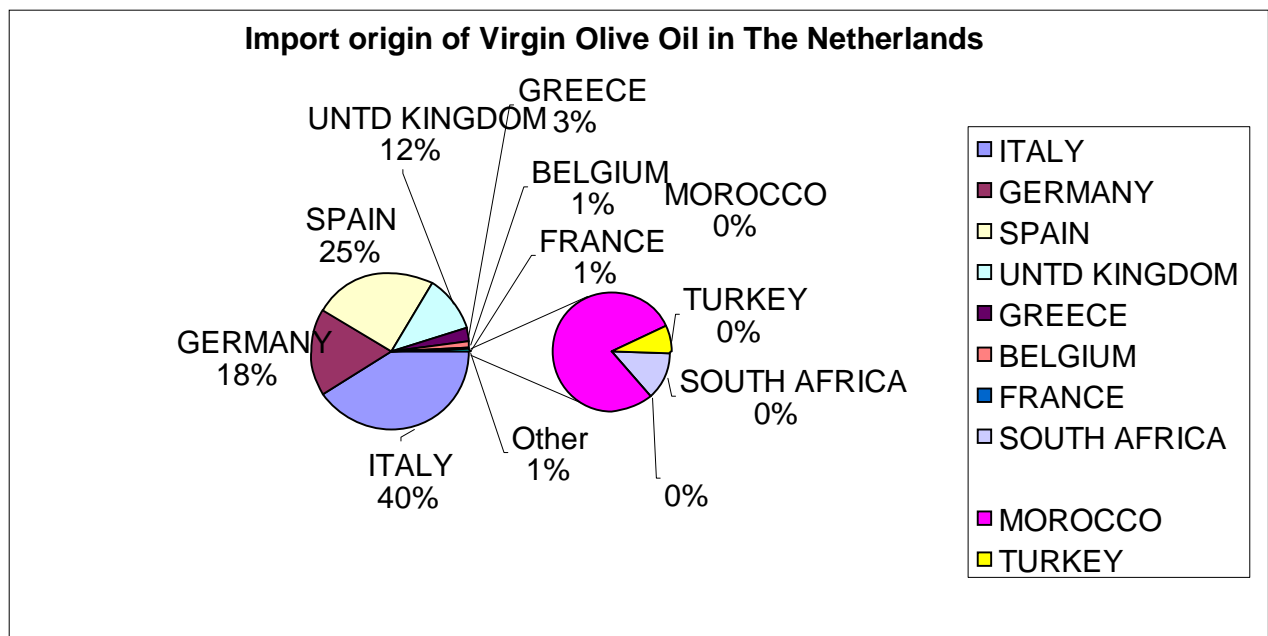
Source: FAOSTAT data, 2005.

## 2.3 The supply side

### 2.3.1 Imports – Exports

Olive oil importers in The Netherlands import directly the largest part of the olive oil they buy, from the main producing countries (Spain, Italy and Greece) as 68% of Dutch virgin olive oil imports originates from these countries (figure 2-4). At the same time, an important part of the import trade is realised through indirect trade networks, as imports destined to the Dutch market are passing through German and UK businesses (18% and 12% of import trade respectively). Olive oil imports from other important producer countries in The Mediterranean such as Morocco and Turkey exists (as one should expect, due to the significant representation of population originating out of these two countries, in The Netherlands), but at a minimal level (at least as far the extra virgin olive oil, is concerned).

Figure 2-4, Imports of virgin olive oil in (2003)



Source PC-TAS, 2005

Olive oil import activity in the Netherlands, is mostly in the hands of big multinationals which have developed similar activities in the global market. A profile of their activities in the international as well the Dutch market follows suit:

**'Bertolli'**, is an Italian based 100% daughter of the Anglo-Dutch **'Unilever - Bestfoods'**, which since the up-grading of the **'Bertolli'** brand to the level of nine global leading brands to be maintained by the food giant, is responsible for producing some 100.000 tonnes of olive oil, out of which one third is destined for Italy and the rest to 50 other countries.

Although **'Bertolli'** is marketed through promoting its Italian origin and lifestyle, the raw product (olive oil) is imported from Spain, Greece and other North African countries

Bertolli operates in the Netherlands through its **'Calvé Nederland'** subsidiary and it markets also brands like **'Becel'** and **'Dante'**. Market intelligence sources (FFT, 2004) estimate Bertollis' total market share (with all its brands) at 60% out of a 33.6 million euro olive oil retail value market.

Other major competitors in the branded Olive oil market such as Salvo of Tuscany, also apply this blending practice with the brand “Filippo Berio” in the Dutch and other markets, while at the same time they also market some olive oil product of different composition and characteristics under “Traditionally Tuscany or Sicilian” brands for the Italian market.

The Spanish ‘SOS Cuétara’ food group (owned by investment funds and financial bodies) has launched a very offensive business strategy aiming to become a leading international food company. Its success is evident, since in the last four years, sales have increased fivefold with olive as a spearhead of expansion. To achieve that SOS quickly acquired various Spanish and Italian brands (the Spanish Carbonell and Koipe, and the Italian Carapelli and Minerva), along of course with their distribution networks and of course direct access to their clientele. Such a growth strategy through acquisitions (especially of the Italian firms) was deemed necessary since they exerted a significant market control in the olive oil sector. Similarly SOS acquired food firms in other sectors such as rice and cookies in order to boost distribution and strengthen its position. Under those brands SOS holds a 20 percent share of the US olive oil market and a leading position to the European market as well. In the Netherlands SOS is present through its Carbonell subsidiary ([‘Carbonell Nederland BV’](#)), but also through the rice distribution section of Sara LEE that it acquired last year. ([www.pwc.com/r&c](#) Food for thought, Jan 2006, Special insert 56, retail & consumer words.). Carbonell is estimated to share a 20% of the Dutch olive oil market.

‘**Mani® Olive Oil**’ (organic), [www.blauel.gr](#), is a vertically integrated firm that produces and bottles organic olive oil in own controlled olive groves in Greece and subsequently markets and distributes its products mainly in Germany, but also in other EU countries, as well as in The Netherlands.

‘**Lerida**’ and ‘**Vea**’, are trade names of high quality extra virgin oils, produced in the Spanish province of Leida, [www.vea.es](#) and distributed in the

‘**De Burg B.V.**’, is a major European level producer (packer) and distributor of sunflower oil, soy bean oil, corn oil, rapeseed oil, olive oil, peanut oil, rapeseed oil. It supplies retailers and caterers with packaging, from 0,75 to 200 liters.

Firms active as food providers to wholesalers, retailers and foodservice:

‘**De Oliehoorn B.V.**’, ‘**Dintel**’ Spanish olive oil in 5 liters PET bottle (also provides arachide oil, Soya, rapeseed and sunflower seed oil)

‘**Diamant**’ is a brand under which some frying types of olive oil are marketed in the Dutch market. This brand name was developed by the “van der Berg” a subsidiary of Unilever, but was recently acquired by the Dutch “Van Dijk foods” group, active in the Dutch food market with several other brands related to oils and fats products.

‘**Epifine**’ is a brand name of ‘Unitall B.V’ which markets various specialty edible oil products within a wide range of other delicatessen products..

Another nine small (table )firms are registered as olive oil importers (along with other activities constituting the core of their business field in The Netherlands, but with a limited scale of activities (as regards olive oil import and distribution):

The market share of all the aforementioned brands (except the two leading ones Bertolli and Gruppo SOS is estimated to 20%.

### 2.3.2 Wholesale trade

General Olive oil wholesale points of sale (Six of 'Hanos' and another 17 independent cash and carry shops, 'Makro', 'AH deli XL', 'Sligro')

Such an importer wholesaler for specialist food stores (delicatessen): '*Casa Lisetta*' imports and distributes Italian olive oil products along with other specialty food and artisan products from Italy

### 2.3.3 Food industry

Established as a commodity trading operation **Cargill B.V.**, based in The Netherlands is today one of Cargill's largest European operations and ranks in the top 20 largest companies in The Netherlands. The group is engaged in processing oilseeds (soybeans, sunflower seed and rapeseed) and in the production of food ingredients as well as in trading and distribution of various agricultural products. Its refineries (Refined Oils Europe) process these oils, as well as coconut, fish and palm oils into high quality refined oils and fats for use in margarine, salad dressing and other food products. In 2005 'Associated Oil Packers' ('aOP', a Cargill subsidiary in the Benelux), increased its glass bottling capacity for Olive Oil, from 10 to 20 million litres a year as part of its strategy to strengthen its position in olive oil exports (currently the third largest olive oil exporter out of Spain). aOP has the availability of the most modern taste panels and laboratory equipment, guaranteeing the quality of its olive oils. The production is certified with ISO9002, BRC and Kosher certificates.

### 2.3.4 Food Retailing

According to business intelligence sources (FFT, 2005), olive oil in the Netherlands is mostly distributed through the retailing channel (92,8%), while the remaining small fraction (7,2%) is consumed through the foodservice (Hotels, restaurants, catering). Major brands of the Unilever and SOS group ('Bertolli', 'Becel' and 'Carbonell' respectively), are available at most super markets in The Netherlands and represent the biggest share of sales, while more high-end brands like 'Dante' and 'Carapelli', are sold by delicatessen and other specialty stores, along with other olive oil products that are privately imported at a small scale directly by producers or traders in the producing countries (mostly from Italy, but also Spain and Greece as well).

Although detailed data are not available, private label olive oil products are also available by most super market chains, while some have developed multiple private label olive oil products, with different quality attributes ((UNCTAD, 2005). Blind taste test, by either experts or consumers (table A-15), have frequently assessed private label olive oils as of better quality/value ratio, against most of the A-brand products which of course receive a much more intensive promotional support from the multinationals.

### 2.3.5 Specialised shops

'*Oil & Vinegar*', Based in Oosterhout (Netherlands) Oil & Vinegar is a franchise formula shop, which has been expanded to consist now of 82 shops in 9 European countries and the US. According to a recent statement of the chain store, Oil & Vinegar aims at opening 135 new stores in the USA and South Africa within the next three years, which will eventually reach a number of 300. The chain store specializes on sales of various types of Oil, vinegar and other Mediterranean

food (pesto, hand made pasta) and kitchenware items (glass and clay). Most foods can be tested in the stores. It currently runs about one hundred stores in ten countries. This Dutch franchise organization was established in 1999 and it operates 40 stores in The Netherlands.

In the Dutch market there also operate another 300 independent specialized butchery, winery, cheese, grocery and general delicatessen stores, which also sell various types of olive oil, which they mostly procure from either cash and carry or delivery wholesalers.

### **2.3.6 Business relationships between the different players in the supply chain**

The Dutch oils and fats industry consists of 4 oilseed crushers, 9 animal fat producers, 11 refiners and hardeners, animal rest-products destructors, oleochemical industry, 10 margarine and vegetable oil producers, 48 sauce producers (using various oils and fats as a main ingredient), 8 oils and fats recyclers, 362 traders, and 6 storage and bottling facilities. Thus the Dutch oils and fats industry consisted in 2003, of 410 companies in total.

The Dutch oils and fats industry is internationally oriented, as on the one hand it relies heavily on imports, in order to procure primary resources, while on the other hand, exports constitute a most significant part of their turnover. In 2003, the Dutch oilseeds, oils and fats industry imported an amount of 2,4 billion euro, while exports reached 1,6 billion euro (Jones and Duerbeck, CBI, 2004).

Import and distribution of vegetable oils in the European market is handled by the following parties:

***Shippers of crude and refined products.*** Firms based in the producing countries who are active in production and export crude and refined products towards processing firms in the importing countries (EU), or to traders, brokers or other processors.

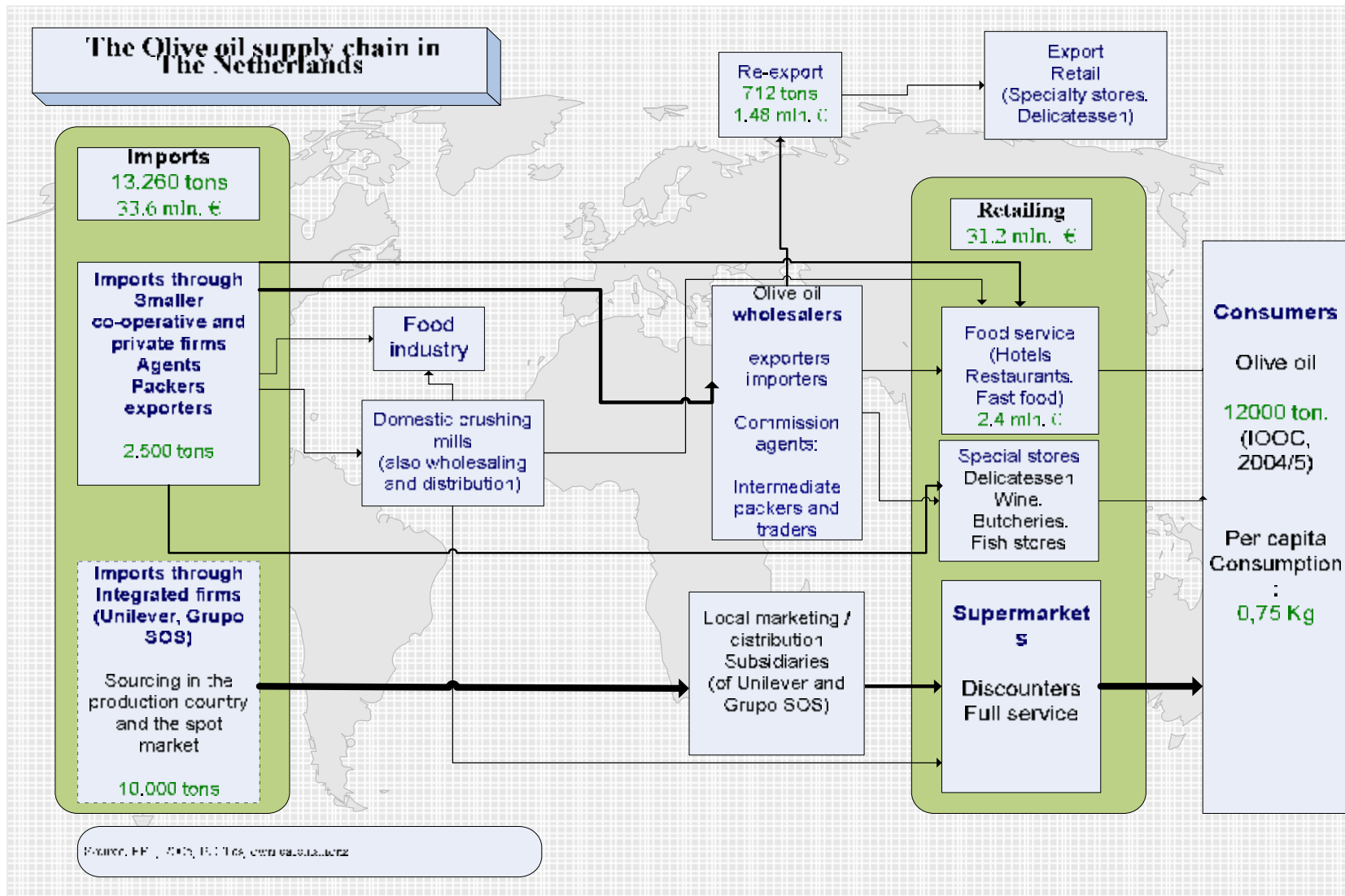
***Traders in crude and refined products.*** Traders buy and sell vegetable oils for their own account and re-sell or re-export these, to other firms in the supply chain.

***Brokers*** are intermediaries in the the process of buying and selling, acting on behalf of their customers, on the basis of a commission. Brokers are not involved in the physical trading process, neither do they take possession of products, Brokers are operating based on their vast information resources, contacts network and experience over market situation, trends, prices and availability.

***Processors of crude and refined products*** who crush and refine oils, to make products suitable for use as ingredients for a wide variety of end products in the food and animal feed industry.

Besides processing, some big multinational companies like Cargill and ADM are also directly involved in trading. Nevertheless, as concentration and consolidation is increasing also in this sector, large European processing firms develop direct contacts with suppliers countries, thereby circumventing other middlemen like brokers and traders

Figure 2-5 Trade flows in the supply chain of olive in The Netherlands in 2003





## 2.3.7 Quality and labelling issues

### Grades and classification

The International Olive Oil Council (IOOC) is an international organisation (a multilateral agreement between olive oil producing countries, created under the auspices of UN) whose main role is to improve olive culture in general by setting the proper policies and common international rules regarding olives and olive oil quality, grades and trading standards ([www.internationaloliveoil.org](http://www.internationaloliveoil.org)).

### Industrial grades

The different types of oil extracted from the olive fruit are classified by IOOC as:

**Virgin**, indicating that the oil was produced by the use of physical means and without any chemical treatment.

**Refined**, which means that the oil has been chemically treated to neutralize strong unpleasant tastes (usually bitterness) and to decrease acid content. Refined oil is regarded as of lower quality compared to virgin oil and it is not allowed to mix it with virgin oils when at least labels refer to either extra virgin or virgin olive oil.

**Pomace olive oil, which** means that oil is extracted from the pomace, with the use of chemical solvents (mostly hexane) and through heating techniques.

Basic and essential methods to assert the type of each olive oil produced are

- a) **Quantitative analytical methods**, where the acidity of each olive is determined (by measuring the weight of free oleic acid and expressing that as a percentage contained in this particular sample of olive oil), and
- b) **Subjective judgement** of the taste and other **organoleptic characteristics** (odour). Expert professional panelists are blind testing the taste to judge for the organoleptic quality level of each olive oil.

### Retail grades

The IOOC standards are complicated. The labels in stores, however, clearly show an oil's grade:

**Extra-virgin olive oil** is produced exclusively from the first pressing of the olives (doesn't contain any refined olive oil), and it has a maximum acidity of 0.8%, while it has to have superior organoleptic characteristics (taste, aroma, colour).

**Virgin olive oil** with an acidity that might be reaching a 2%, while it should also be produced from first pressing (not refined), with acceptable (good) taste..

**Olive oil** is a blend of virgin oil and refined virgin oil, with an acidity of no more than 1% acidity. Many olive oils which are marketed as 'light olive oils', usually are officially classified in this category and they have milder taste, odour and colour as a result of the refining and blending processes that have been subject to.

***Olive-pomace oil*** is a blend of refined pomace olive oil and virgin oil. It can be consumed but it should not be called olive oil. It is mostly used for cooking (baking or frying) in the food-service sector.

***Lampante*** oil is olive oil not fit for food consumption (the name itself indicates its origin as it had been used as fuel in oil-burning lamps. It has nevertheless some applications in the industrial market.

### **Label wording**

Olive oil exporters, traders wholesalers and other olive oil suppliers, use sometimes carefully selected wording to create a higher product image that in reality, so as to increase market value of that particular product, while if rules were kept stricter and terminology had been constrained to commonly accepted official terms (IOOC terminology), such misleading wording should have been avoided.

***"Imported from Italy, or "bottled in Italy" or "product of Italy"*** are terms frequently used by Italian olive oil exporters in order to imply that the respective olive oil was produced by olives grown in Italy, although in fact (most frequently) that oil was only bottled there. Such labels sometimes do indicate (with small letter though) that the oil was packed in Italy with olives grown elsewhere in the Mediterranean region (Spain, Greece, Turkey, and Tunisia) as Italy imports large quantities of olive oil from these countries in bulk and then processes it (mixing with local olive oil, or produces different types of blends).

***"100% Pure Olive Oil"*** sounds like a superior product, but in practice it is often olive oil of the lowest quality (with high acidity, or bitter, or inferior organoleptic characteristics). Nevertheless although this might not be the best choice for salad oil, it could be though perfectly suitable for baking and frying, since heat can destroy the rich flavor of extra-virgin oil, in any case.

***"Made from refined olive oils"*** suggests that this is a fine product whereas in fact means that the final organoleptic characteristics (color, taste and acidity) were achieved through a chemical process.

***"Light ( or lite), olive oil"*** suggests a low fat content, whereas in fact it refers to a lighter color. Fact is that all olive oil has the same amount of Calories (120) per tablespoon (33 kJ/ml).

***"From hand-picked olives"***, suggests that extraordinary care was given for the production of this oil, whereas there is no proof of the superiority of manual harvesting methods over the most modern (widely applied) tree-shaking method.

***"Cold pressed, or first press"*** is another term which is used to associate this particular olive oil with traditional (thus pure and superior) oil extraction methods, whereas almost all olive oil currently processed by olive mills goes under more modern methods (mostly centrifuge) which imply some degree of higher temperature treatment and certainly doesn't rely on the old fashioned mechanical presses.

### **2.3.8 Institutional structure**

The International Olive Oil Council was created in 1956 (through the proclamation of the "International Olive Oil Agreement" as multilateral agreement between olive oil producing

countries international olive and olive oil market is The creation of the, as a consequence of the entry into force of the, was a true act of faith.

sets standards of quality used by the major olive oil producing countries. It officially governs 95 percent of and holds great influence over the rest. IOOC terminology is precise, but it can lead to confusion between the words that describe production and the words used on retail labels. Olive oil is classified by the method applied ofr its production, by its chemical characteristics and by its flavor.

Apart from the obvious trade concerns and the need to organise the international olive oil market, this move highlighted the common desire of the members to set up and develop a united framework to defend and safeguard the olive tree and olive oil.

For most of the parties to the Agreement, olive farming must necessarily be taken into account in any detailed consideration of agriculture, employment, rural depopulation, trade in agrifoodstuffs, soil and environmental conservation and many other subjects of fundamental socio-economic importance.

As the intergovernmental organisation in charge of administering the International Olive Oil Agreement, the International Olive Oil Council has become over the years a unique multilateral tool working for world olive farming.

The Product Board for Margarine, Fats and Oils is a private institution created under public law in order to promote the oils and fats industry's interests in the national and international law creating and policymaking process and to inform the oils and fats enterprises on law and policy issues as well as market developments and opportunities that are or may be significant to the enterprises' commercial decisions, investment planning and day-to-day activities.

### **2.3.9 Dutch oils and fats industry**

The Dutch oils and fats industry consists of oilseed crushers, animal fat producers, refiners and hardeners, animal rest-products destructors, oleochemical industry, margarine and vegetable oil producers, sauce producers, oils and fats recyclers, traders, and storage and bottling facilities.

#### **Refining**

The Netherlands have 11 companies in 2003 that refine and/or harden vegetable oils and animal fats (including fish oils).

End-products are refined unhardened and hardened oils and fats, and other products such as lecithin, for the food, feed and oleochemical industries. By-products are fatty acids and residuals from distillation. These latter products, which may be vegetable or animal, are sold to the oleochemical industry and the feed industry.

Crushers, refiners and hardeners have their own branch organization, the Dutch Edible Oils and Fats Producers Association (Vernof).

#### **Margarine and oil production**

In The Netherlands there are 8 companies either producing margarine products (margarines, light margarines, low-fat products) or cooking oils (baking and frying oils and fats, oil mixes and related products).

These companies have a branch organization, the Dutch Margarine Producers Association (BNMF). Refined oils and fats are the resources for this industry's products.

The companies involved sell both final products to consumers and other companies (restaurants, institutions, bars and so on) and products to other food industries, such as the bakery branch.

### **Oils and fats blending**

This branch - involving 9 companies - collects, melts and purifies vegetable oils and fats and fatty acids, and mixes them to attain a fatty acid composition as desired by the customers.

Some fat recyclers also collect fatty rest-products from food industries.

### **Storage and bottling**

In the Netherlands 6 companies are involved in storing vegetable oils, usually oils that fulfil a stock buffer function for importing and exporting companies that buy and sell in large quantities.

In 2003 there are 5 companies which bottle and market - sometimes imported - vegetable oils.

## **2.4 Conclusions**

Based on the increasing consumer concerns over the health effects of various food items and the respective value of their eating habits, olive oil consumption in the Netherlands, has increased with very high rates in recent years, and continues to gain market share against other edible oils and fats, along with the expansion of the Mediterranean eating styles and expansion of the uses of ingredients for such a diet.

The largest market share for olive oil is in the hands of the big retail chains which are using either A-brands which are heavily supported from multinationals and other big companies, or rely on direct procurement of private label olive oils, which they can offer at competitive price levels in order to compete with A-brands.

Alternative marketing channels for small scale olive oil producers and exporters can be found in the specialty stores (delicatessen, wine stores, butchery and cheese stores). The sales volume for olive oil through this channel gradually increases, at least for as long as olive oil products are offered with competitive terms of price and marketing support.

Olive oil is imported in the Netherlands, not only directly from the producing countries but also through other neighboring countries (mostly Germany and UK), as olive oil traders which operate mainly in those countries and have developed a clientele network in other countries and also re-export olive oil.

Despite the fact that no olive oil is produced in The Netherlands, a certain volume of olive oil, is also exported (re-exported), due to the commercial activity of trading and special retailing firms which operate not only in the Netherlands but in a number of other countries as well.

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## **Supply Chain Analysis of the olive oil market in Germany**

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by

*Volker Hart, Aikaterini Kavallari, P. Michael Schmitz and Tobias C. Wronka*

### **3 The Olive oil supply chain in Germany**

#### **3.1 Introduction**

Olive oil is a typical product of the Mediterranean basin, where almost all of the world production takes place. Due to campaigns for a healthier way of living, consumption of olive oil has also increased in non Mediterranean countries in recent years. As a result of the expanded demand the different participants in the supply chain of olive oil strengthen their efforts to obtain a higher market share in these non-traditional markets.

Germany with 82.5 million inhabitants is of special interest for olive oil producing countries as it serves as an attractive export destination. Although during the period 1997/98 Germany imported only about 2.6 % of the world's imports of olive oil and consumed about 0.9 % of the world consumption, it is considered to be a very dynamic market (Ward et al., 2002). Olive oil becomes more and more popular in Germany not only through the "for a healthier life" campaigns but also through immigrants coming from the Mediterranean basin. Another reason for the growing popularity of olive oil is the increasing convergence of the consumption habits of the European people as a consequence of the expanded tourism to southern countries. The Germans are integrating the Mediterranean diet into their own habits and thus changing gradually their way of cooking in using more and more olive oil in their dishes.

Against this background this report aims to analyse the supply chain of olive oil in Germany. For this purpose the report is organised in five chapters. Following the introduction, the second chapter deals with the demand and the third one with the supply of olive oil in Germany. Quality and labelling issues related with the consumption of olive oil are discussed in the fourth chapter. In the fifth chapter the institutions and organisations in Germany occupied with olive oil are briefly presented. After the conclusions follows the annex including detailed tables.

#### **3.2 The demand side**

Olive oil as a vegetable oil belongs to the food category "fats for food uses". In order to assess accurately the increasing importance of olive oil within this category, firstly, it is necessary to give a brief overview about the developments of fats for food uses as a whole.

The domestic use for all oils and fats has steadily increased from 1997 to 2003 (Table 3.2). Whereas the consumption for food uses has declined over the considered period, the use for feed and manufacture purposes has noticeably raised. The developments for the domestic use of vegetable oils and fats are similar to those of all oils and fats, i.e. the share of food consumption on domestic use has decreased, while feed and manufacture uses have become more important over time. The food consumption of vegetable oils and fats account for about 50 % of the total food consumption of all oils and fats.

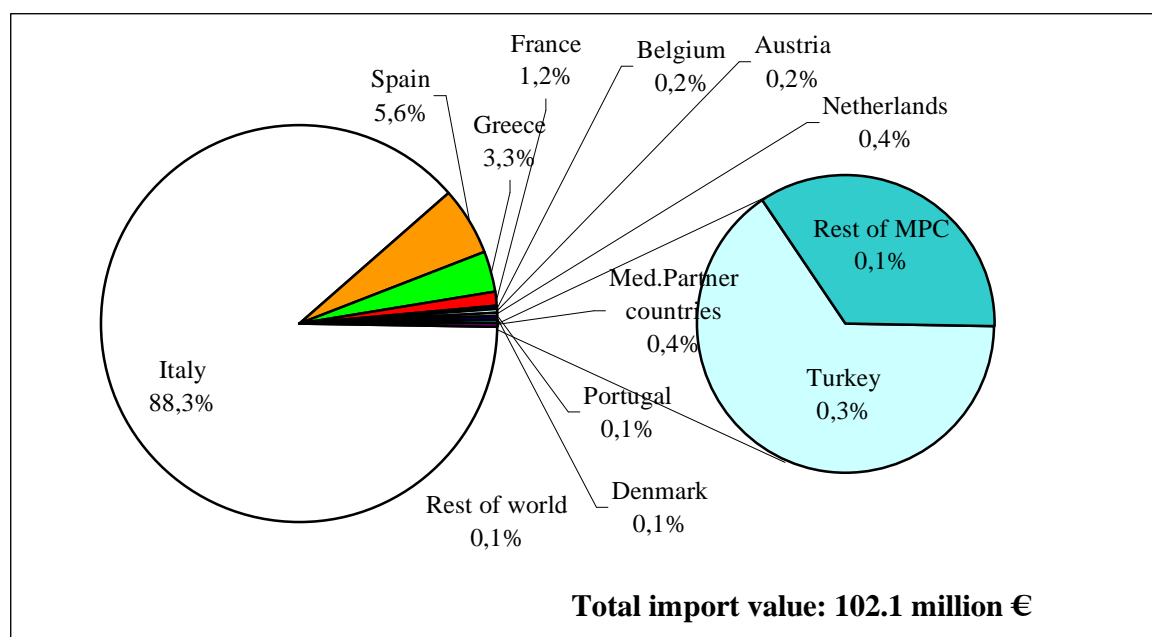
**Table 3-1: Market developments of all oils and fats (AF) and vegetable oils and fats (VO) in 1,000 tonnes in Germany**

	1997		2000		2003	
	AF	VF	AF	VO	AF	VO
Production	3,350	2,520	3,763	2,830	3,688	2,750
thereof domestic production	1,730	913	2,193	1,283	2,215	1,309
Imports	1,721	1,490	1,959	1,769	2,195	2,085
Exports	2,273	1,845	2,376	2,012	2,126	1,777
Domestic use	2,833	2,198	3,311	2,549	3,760	3,059
thereof manufacture use	513	387	819	714	1,461	1,156
feed use	223	38	362	134	424	411
food use	2097	1,085	2,130	1,179	1,875	1,054
Degree of self-sufficiency in %	61	42	66	50	59	43

Source: BMVEL, 2004.

Due to unsuitable climatic conditions no cultivation of olive trees takes place in Germany. Thus, the demand of olive oil is covered through imports only. Among the different import categories of olive oil, the most important one is the virgin olive oil. It's imports are about 87 % of the total imported quantity of olive oil in Germany (34,329 tonnes out of 39,467 tonnes). As shown in figure 1, most of the German imports of virgin olive oil come from Italy, which in terms of value account for about 88 % of the imports followed by Spain and Greece with 5.6 and 3.3 %, respectively.

**Figure 3-1: Imports of virgin olive oil in Germany (2003)**



Source: PC-TAS; Own illustration.

The non-EU Mediterranean Countries altogether account only for about 0.4 % of the German



imports with Turkey as the distinguishing country. However, the trend<sup>1</sup> of their imports in terms of quantity and value is positive with 20 and 12 % respectively, indicating positive developments of Mediterranean exports to Germany. (see Annex: **Σφάλμα! Λανθασμένη αναφορά σελιδοδείκτη στον εαυτό του.**)

As already mentioned above, much less important are other olive oil categories, such as olive oil refined but not chemically modified and refined olive oil. However, again most of the German imports originate from Italy. Interesting though is the fact that the trend of the imports of olive oil refined but not chemically modified from all countries of origin as a whole is negative. Apparently, this category of olive oil is of lower and of decreasing significance for the German market. As far as refined olive oil is concerned, Italy and Spain have increased their shares in the last five years, whereas the trend in percentage for all other major suppliers is negative (see Annex: Table 0-9).

Using the data from Tables 1 and 3 the import share for olive oil of the total imports of vegetable oils and fats could be calculated. Although olive oil accounts in terms of volume only for approximately 1.7 % in the year 2003, its consumption has continuously increased in the considered period. According to the International Olive Oil Council (IOOC), the consumption of olive oil has increased from 22,300 tonnes in the farm year 1997/98 to 37,400 tonnes in 2002/03.

**Table 3-2: Consumption of olive oil in Germany**

	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03
Consumption in 1,000 t	22,3	23,4	26,6	35,0	36,5	37,4
Consumption in kg/capita	0,27	0,29	0,32	0,43	0,44	0,45

Source: IOOC, 2005; Own calculations.

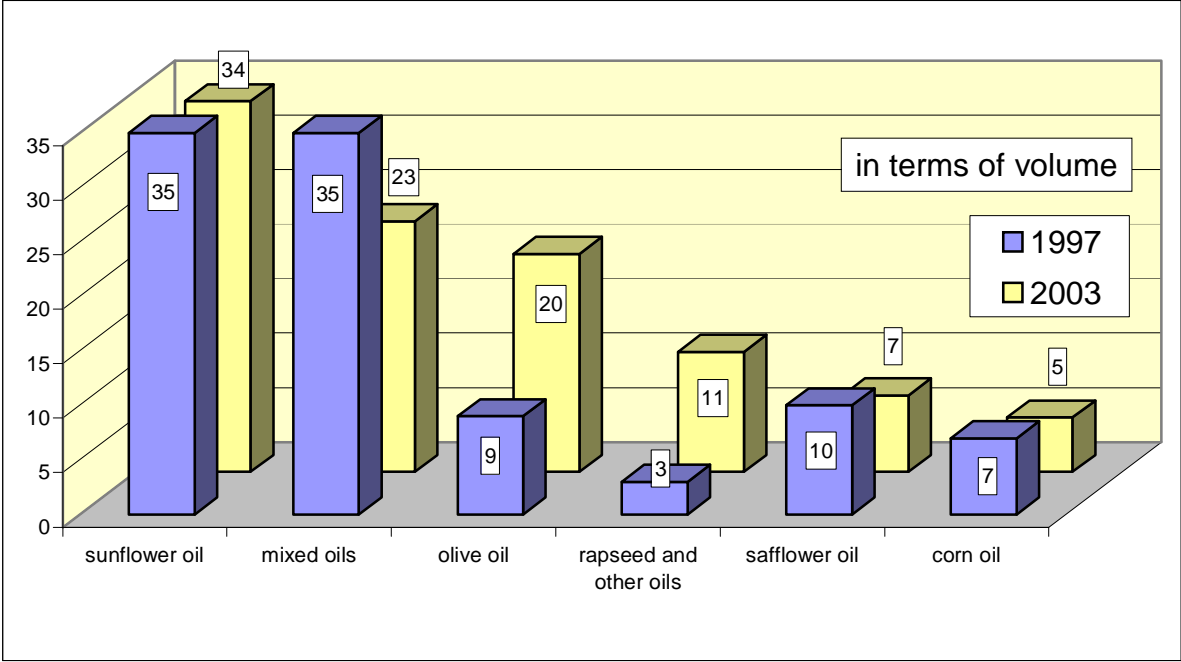
In the same period the per capita consumption has also increased from 0.27 kg to 0.45 kg<sup>2</sup> (). The significant rise in per capita consumption of olive oil has been confirmed by a consumer panel study carried out by the Gesellschaft für Konsumforschung (GfK). Its results show an increase from 0.19 kg in 1997 to 0.48 kg per capita in 1999 (ASOLIVA, 2003).

The developments in the per capita consumption of olive oil together with the stagnation for consumption of other edible oils has led to significant changes in the consumption pattern of edible oils. Figure 2 illustrates the consumption trend of different edible oils with regard to their quantity share in 1997 and 2003. In 1997 the two most important edible oils were sunflower oil and mixed oils with each a share of 35 %. Regarding to its quantity share, olive oil was only of minor importance in the year 1997. This has changed considerably since then. Whereas the share of mixed oils has declined down to 23 % in 2003, the quantity share of olive oil has increased to 20 %.

<sup>1</sup> The trend according to PC-TAS is calculated as the annual average growth rate (in percent) of selected values, based on least squares exponential formula, over five years

<sup>2</sup> Experts assume foreign households' consumption of olive oil to be about 60 % of the whole per capita consumption in Germany.

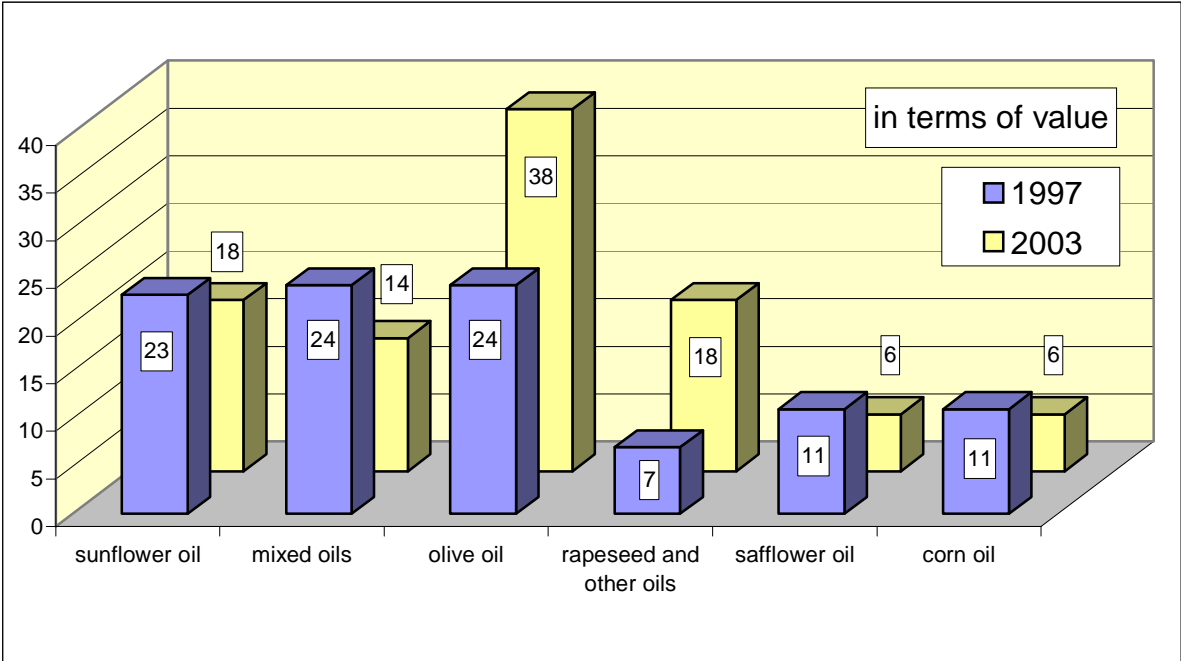
**Figure 3-2: Development of the consumption of edible oils in 1997 vs. 2003 in %**



Source: ASOLIVA, 2003.

Looking at Figure 3, which shows the development of the consumption of edible oils with respect to their value shares, the picture alters significantly. In the year 1997 there were three important edible oils: sunflower oil, mixed oils and olive oil with each a share of approximately 24 %. In 2003 the importance of olive oil has increased substantially up to a value share of 38 %, making it the most important edible oil with regard to its value share on consumption.

**Figure 3-3: Development of the consumption of edible oils in 1997 vs. 2003 in %**



Source: ASOLIVA, 2003.

### 3.3 The supply side

The supply chain of olive oil in Germany is characterised by a limited number of participants and thus rather straightforward linkages between the different distribution channels.

It should be noted though that there are several difficulties in obtaining reliable data for the German supply chain of olive oil. The official statistics provide data only for the imports and exports of olive oil, but no further information is given about its distribution in the German market. Through an intensive literature research only two studies have been detected with useable content about the German market of olive oil, namely a Spanish study by the Spanish Consulate General based in Düsseldorf and a study prepared by “Food for Thought”. Especially the information given by the latter study should be treated with caution as the study appears quite unserious, an anticipation which has been confirmed by later expert interviews. The difficulties regarding reliable data availability, made it necessary to resort to expert interviews<sup>3</sup> and to conduct a survey among the importers of olive oil in Germany<sup>4</sup>. A total of 101 importers have been contacted, of which 19 importers have sent back their questionnaire so far. Although the response rate of 19 % does not allow representative conclusions, along with the expert interviews and in combination with the official statistical data, they are valuable and the sole information source for the analysis of the supply chain of olive oil in Germany.

In the following a detailed view of the different agents of the supply chain is given, which is structured according to the position of each agent within the chain, as shown in Figure 3-7. The description starts with the importers, continues with the wholesale trade, the food industry, the retail trade, the specialised shops and ends with the big consumers.

#### 3.3.1 Imports – Exports

According to the trade database PC-TAS in the year 2003 39,467 tonnes were imported by Germany which were equal to a value of 116.4 million €. As mentioned above, the majority of olive oil in the German market is imported from Italy, followed by Spain and Greece. This corresponds favourably with our survey results, where on a non-weighted average 56.21 % of the imported olive oil is of Italian origin, 28.26 % of Spanish, 8.89 % of Greek and 6.63 % of other origin<sup>5</sup>. More specifically, out of 19 importers 14 stated they import from Italy while 5 told to import their entire olive oil from Italy. In the case of Spain and Greece as the country of origin, 8 and 7 out of 19 interviewed importers mentioned to import from these countries, respectively. Half of the Spanish olive oil importers purchase their whole oil from Spain only, whereas 1 importer imports only from Portugal. Although the discovered figures from the survey are not representative due to the relative low response rate, they indeed confirm each countries' importance, i.e. Italy is the most important source of supply. The main part of the imported olive oil is intended to cover the domestic demand. With 1,372 tonnes or 3.5 % of the imported volume, exports are of minor importance and concern only re-exports of some firms to neighbouring European countries (i.e. the Netherlands and Austria) (see Annex:

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<sup>3</sup> The authors are indebted to Mr Fissenewert of the Italian Institute of Foreign Trade (I.C.E.), who provided his expert view of the German market of olive oil in several telephone talks. Furthermore, the authors are grateful to Mr Oberg, who also supported this study with valuable information.

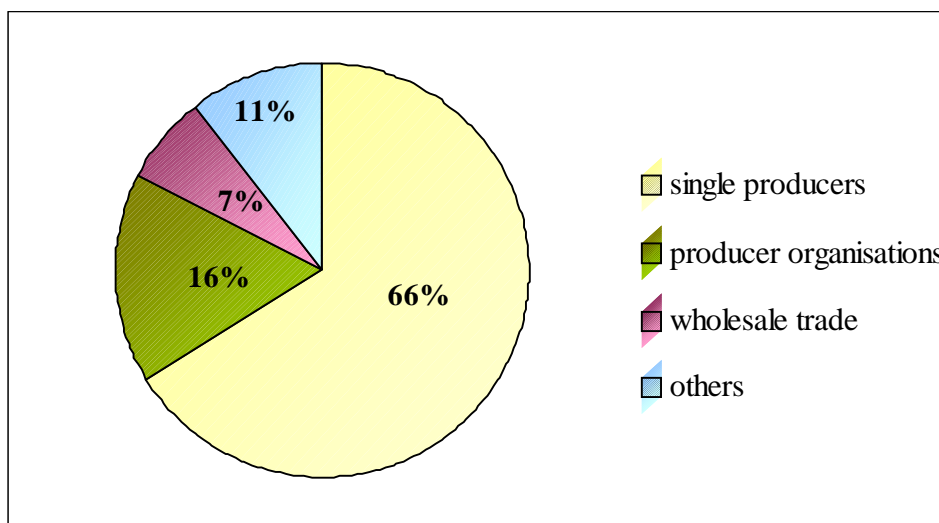
<sup>4</sup> The authors are obliged to Mr Uzcanga of the Spanish Consulate General in Düsseldorf and again to Mr Fissenewert of the I.C.E. for providing lists of importers of olive oil in Germany. The full consolidated list can be found in the Annex, Table 0-14.

<sup>5</sup> These figures have been calculated as an average of the respondents' statements given in percentage shares.

Table 0-11).

According to the survey results, most of the imported olive oil in terms of volume is acquired directly from producers (66 %), followed by producer organisations (16 %), other sources (i.e. bottler) (11 %) and wholesale trade (7 %) (Figure 3-4). In absolute terms, 9 importers receive the entire quantity of their olive oil directly from producers, 2 solely from producer organisations, 1 from the gastronomy and the rest from a combination of the above mentioned suppliers. However, according to the survey results the most important source of supply are the single producers and producer organisation, as 15 and 6 out of 19 importers have chosen these categories, respectively.

**Figure 3-4: Suppliers of olive oil to the importers in terms of volume , in %.**



Source: Own survey.

The majority of the imported olive oil is already labelled and packaged when it enters the German market, a fact also supported by the survey results, with one single exception of an oil mill. The indicated package sizes range from very small ones like 0.08 lt., 0.1 lt. and 0.25 lt., over 0.5 lt., 0.75 lt. and 1lt. up to 5lt., 10lt. and 174 lt. Whereas the 10lt. package is distributed only to big consumers (hotels, restaurants etc.) and the 174 lt. are imported by an oil mill for the food industry, all other package sizes are distributed through the different possible channels in the supply chain, except for the food industry.

However, olive oil in particular from countries with limited marketing channels in Germany like Spain and Greece, is either directly exported in bulks to big consumers in Germany (i.e. Spanish and Greek restaurants) or redirected over Italy, blended there with other olive oils and finally entering the German market under an Italian brand name. In recent years though, those producing countries are increasing their efforts to market their olive oil as standardised and already bottled in packages less than 5 litres, so as to promote it with their own brand names.

This is for example the case of the Spanish association of producers and exporters of olive oil ASOLIVA (ASOLIVA, 2003). In the year 2001 ASOLIVA exported approximately 1.62 million tonnes in loose bulks, that is non standardised and in containers bigger than five litre and 0.65 million tonnes standardised and in packages less than five litre to Germany. The share of standardised olive oil has significantly increased over the years, indicating the growing efforts of Spanish olive oil producers to create own brands for their olive oil and thus to market it directly to

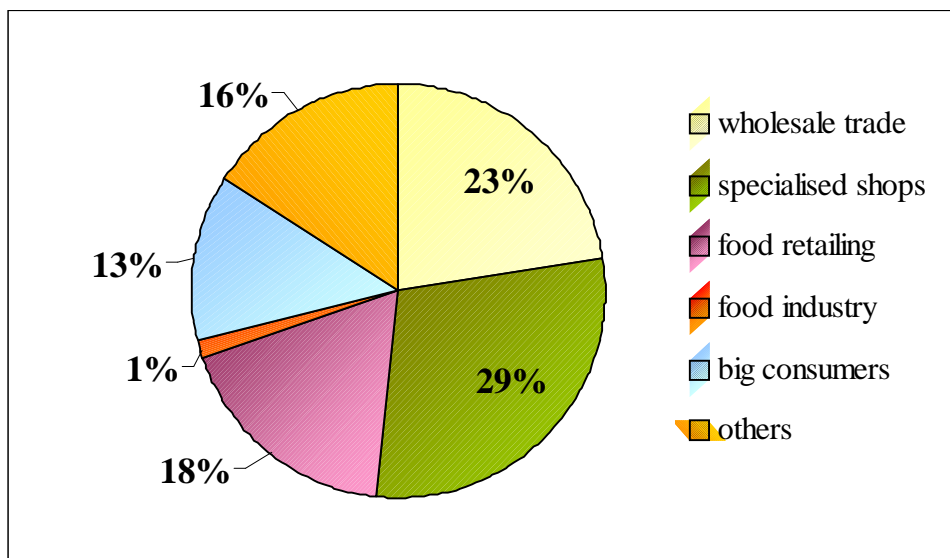
the food retailing or specialised shops in Germany (ASOLIVA, 2005). Another similar example is the case of the oil of the Greek producer company “Gaia”, imported and distributed by the “Importhaus Wilms” (Gaea, 2005) and the oil of the agricultural cooperative of Sitia “Kloster Toplou”, imported and distributed by the “Lukullus GmbH” (Kloster Toplou, 2005).

According to the survey and the PC-TAC database, the quality of the imported olive oil is mainly the highest one i.e. extra virgin. Only one importer reported imports of native olive oil for the wholesale trade, the retail and big consumers and another one imports pomace olive oil for the gastronomy.

One of the biggest importers of olive oil from Italy is the “BLM Produktions- und Vertriebsgesellschaft mbH & Co.KG”, one of the key importers for the discount market Aldi. BLM based in Buchholz belongs to the Betz Holding and calls itself the specialist for Italian products. This enterprise has an own logistic business called “PMB”, which is responsible for the whole logistic assignment and thus is in charge of importing food products from Italy, the storage and the final distribution (BLM, 2005). There are no intermediate storages in Germany, as BLM directly supplies the appropriate platforms of the Aldi supermarkets. Two other importers for Aldi are the Alfred Graf GmbH & Co.KG and the Clama GmbH belonging to the KM Mahnke Group (Fissenewert, 2005).

In the case of the discount market Lidl, it imports directly through Lidl International and does not use intermediate importers. The bottler RM Oleificio in Lucca delivers the olive oil to the loading platform in Verona and consigns it there to Lidl (Fissenewert, 2005).

**Figure 3-5: Recipients of olive oil in terms of value, in %.**



Source: Own survey.

As Figure 3-5 shows, on a non-weighted average 23 % of the imported olive oil in terms of value is delivered to the wholesale trade, 29 % to specialised shops, 18 % to the food retailing, 13 % to big consumers, 16 % directly to the consumers (others) and 1 % to the food industry<sup>6</sup>. Apart from

<sup>6</sup> Again, these figures have been calculated as an average of the respondents’ statements given as a percentage share.

the food industry and direct selling to consumers, the other distribution channels are of similar importance to the interviewed importers<sup>7</sup>. For each of the rest categories 9-12 out of 19 importers stated to distribute their olive oil to the respective recipient. Furthermore, it should be noted that only 1 importer delivers its entire olive oil exclusively to specialised shops, 1 importer solely to the food retailing and 1 to big consumers.

### 3.3.2 Wholesale trade

The sole information source about the wholesale trade are the results of the conducted survey among the importers of olive oil. Both the sample size of the survey as well as the response rate of 19 % do not allow for representative conclusions regarding the activities and the real importance of the wholesale trade within the supply chain of olive oil. Thus, only qualitative conclusions can be drawn, namely that indeed wholesalers can act as middlemen between the importers and the food retailing, big consumers and the specialised shops (see Figure 3-5).

### 3.3.3 Food industry

The food industry is supplied with olive oil both by the importers and most probably also by wholesalers, whereas equal possible is that it imports directly olive oil. Here again the only information are the results of the survey. One oil mill, which imports mainly from Italy in bulks extra native olive oil, distributes it to the food industry in bulks (174 lt. package).

### 3.3.4 Food Retailing

The food retailing (supermarkets, warehouses, discount markets) is the major recipient of olive oil in Germany. According to Fissenewert (2005) about 77 %<sup>8</sup> of the imported volume of olive oil goes into the food retailing, which equals 30,476 tonnes.

Although no information about the value share is available, in order to classify the significance of the retail trade within the supply chain, an auxiliary calculation was done. Therefore an average price of 3 € per 750ml was assumed and resulted a total value of 133.1 million €<sup>10</sup> by multiplying the price with the respective quantity.

About 60 % of the flowing quantity in the food retailing is marketed by discounters like Aldi, Lidl and Penny and the remaining 40 % by other supermarket chains and warehouses. Among the discounters, Aldi is the predominant with a market share of about 50 % on the total discounter share and thus a respective total market share of about 30 % (Fissenewert, 2005).

Oberg (2005) and Fissenewert (2005) agree that about 75 – 80 % of the olive oil is marketed under retailer brands, like “Villa da Badia” (Rewe), “Bancetto” (Edeka), “Cantinnelle” (Aldi Süd) and about 25 – 20 % under manufacture brands. Under the brand “Bertolli”, Unilever Bestfood

<sup>7</sup> As it will be described later, the importance of the food retailing seems to be underestimated by the survey.

<sup>8</sup> As share on the remaining olive oil in the German market after deducting the exports from the whole imports.

<sup>9</sup> The assumed price is based on personal observations of the authors in the German market and it serves therefore only as an approximate price.

<sup>10</sup> This figure is similar to the finding of a study conducted by the market research institute A.C. Nielson. According to their study results in 2003 olive oil was predominant in the edible oil sector with a turnover of 107.49 million € (whole food retailing excluding Aldi) (UFOP, 2005).

GmbH markets its olive oil and claims to have a market share of 12 % in terms of value and 6 % in terms of volume (Unilever Deutschland Holding GmbH, 2005). Other well known manufacture brand names of olive oil are “Mazola” and “La Espanola”, “Minerva Sasso”, “Kloster Toplou”.

### **3.3.5 Specialised shops**

Specialised shops such as delicatessen shops are another important recipient of olive oil. Although through these shops only 3,048 tonnes or about 8 % of the volume of olive oil in Germany is marketed, its significance in terms of value is considerably higher (Fissenewert, 2005). Again, in order to give an estimation about the value, an auxiliary calculation as previously follows. In this case an average price of 11 €per 750 ml bottle was assumed, which results in a total value for this distribution channel of 48.8 million € The prices of these olive oils are significantly higher compared to oils in other distribution channels. This is mostly due to the higher quality and often higher production costs. Specialised shops usually market olive oil with brand names of producers, which are often of protected geographical origin or protected designation of origin. One major trend for specialised shops are the increasing demand for very small packages of olive oil with different aroma. Among specialised shops there are a growing number of those which offer the consumer the possibility to bottle the different oils himself in small aesthetic bottles as a gift. Furthermore there are great deal of online-shops selling high quality olive oil.

### **3.3.6 Big consumers**

Big consumers like hotels, restaurants and other institutions are being attributed a share of 11.6 % of the total market volume of olive oil equal to 4,571 tonnes (Fissenewert, 2005). Assuming an average price of 3 €per 750 ml bottle, a value of 19.9 million €was calculated.

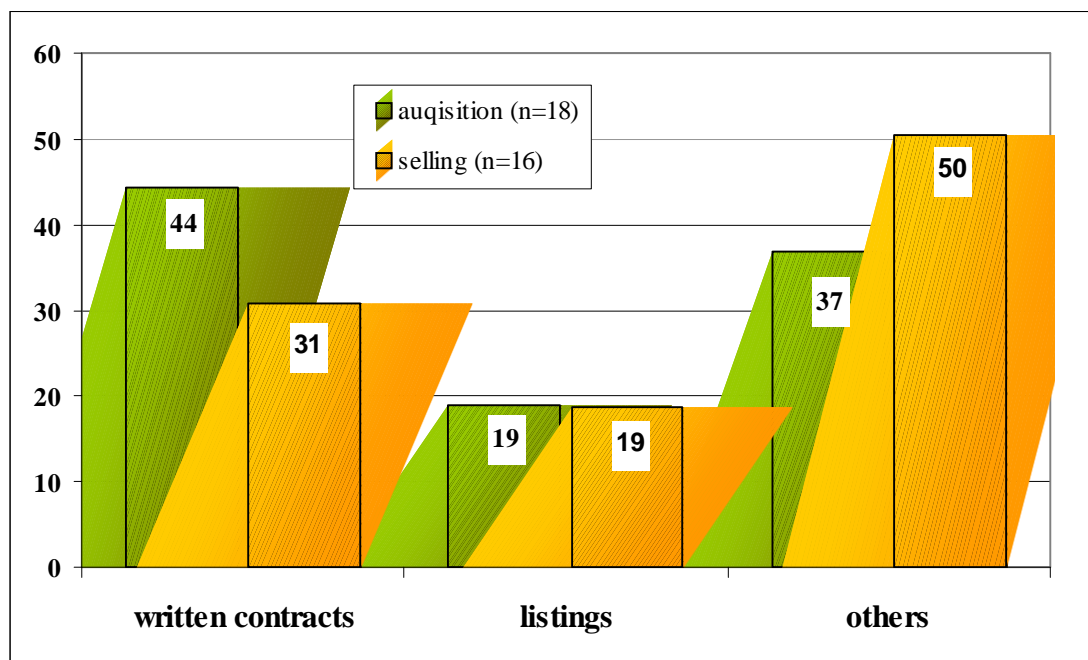
Regarding the quality of olive oil supplied to big consumers, the survey and the expert interviews indicate that it is not the highest one. As mentioned above one importer delivers native olive oil in 10lt. package to the gastronomy.

### **3.3.7 Business relationships between the different players in the supply chain**

Until now the report concentrated on the trade flow of olive oil between the different actors in the supply chain. In this part it is tried to be explained how the supply flows are arranged and what kind of business relationships exist among the different actors of the chain. Sole source of information is the special conducted survey for the needs of this report.

The results of the survey are depicted in Figure 3-6. Almost half of the imported olive oil is acquired through written contracts between the importers and their suppliers (44.33 % or 9 importers of the 18). Equally important are other order mechanisms as per fax or telephone with a percentage of 36.78 % (or 8 importers out of 18), whereas 18.89 % is handled via listings (4 importers out of 18). It should be noted that 3 importers use a combination of these instruments for buying olive oil, whereas one importer did not answer the question.

**Figure 3-6: Acquisition and selling mechanisms of the importers (in %)**

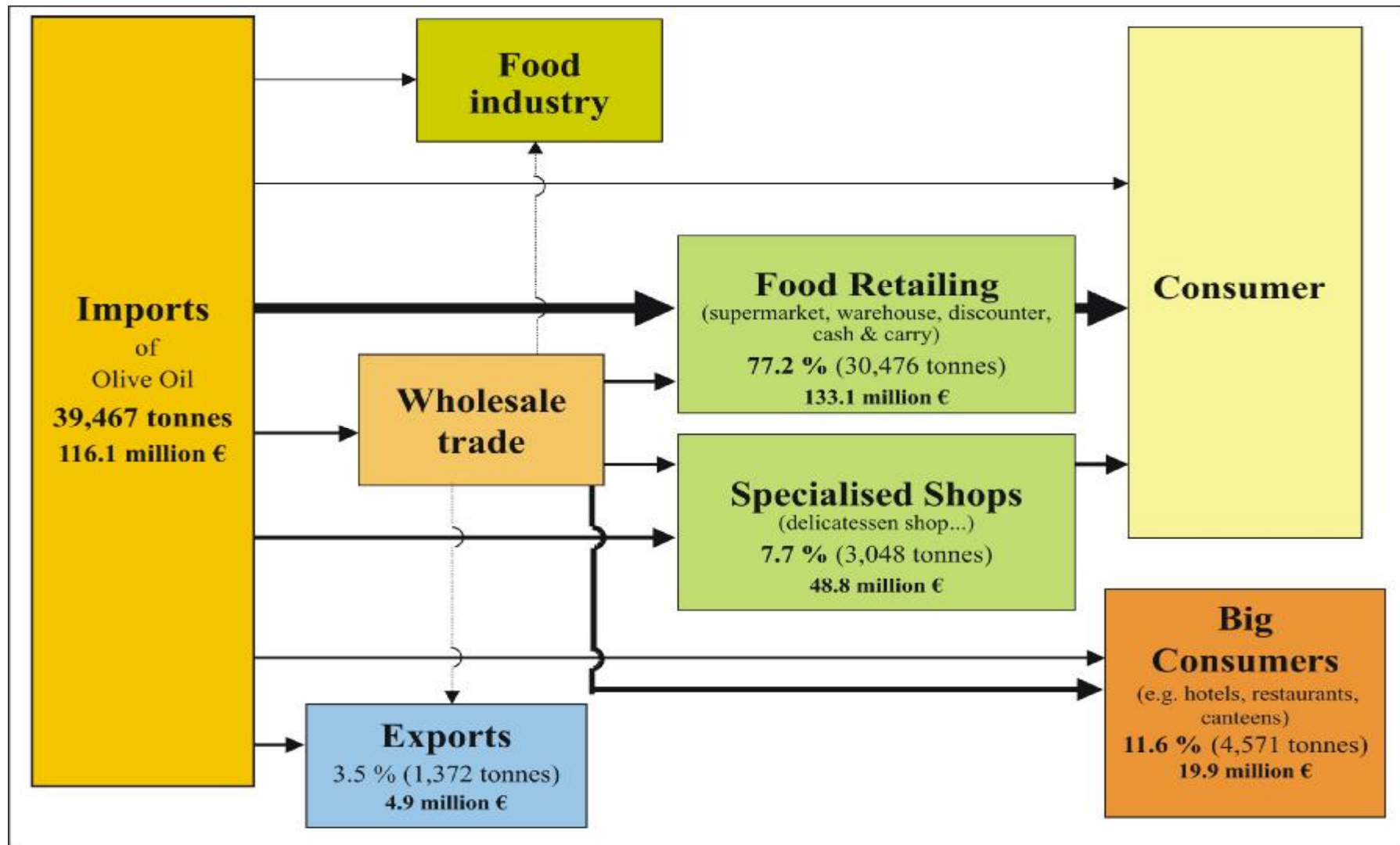


Source: Own survey

The main selling mechanisms from the 16 observations are instruments under the category “others” such as commissioned transactions or orders made per telephone or fax depending on the demand (50.38 %), operations typical for brokers. Other selling mechanisms are through written contracts (30.88 %) and listings (18.75 %). In particular 7 importers sell 100 % of the quantity of olive oil through instruments of the category “other”, 4 through written contracts, 2 through listings, whereas the rest 3 use a combination of the mechanisms.



Figure 3-7: Trade flows in the supply chain of olive oil in Germany, 2003



Source: PC-TAS; Fissenewert, 2005; Oberg, 2005a; own calculations

### 3.3.8 Quality and labelling issues

The EU has recognised quality as a key factor to increase consumer confidence and consumption of olive oil in both member countries and third countries. Efforts initiated by the EU to improve the product quality, in accordance with the standards of the IOOC are reflected in the new framework for olive oil marketing in the Community (EU Regulation 796/2002 and 1019/2002). The various quality categories have been redefined and more technologically advanced organoleptic methods have been introduced for a more proper categorisation of olive oil.

The label of each package comprises of several mandatory information, i.e. the category of the oil (e.g. extra virgin), the filling quantity, the expiry date, the address of either the producer, bottler or trader, the regional origin in case of oil from protected designation of origin or protected geographical origin and a declaration of the nutrient content in case of advertising with positive attributes such as cholesterol free, rich in Vitamin E or rich in linoleic acid (Oberg, 2005b). Additionally, there are numerous facultative declarations possible, such as the variety of the olives from which the oil was extracted, the harvest period and the harvest method, the date of bottling and indications for storage. Since most of the German olive oil is labelled as extra virgin, those voluntary information are often the only measure for producers of more expensive olive oil to distinguish their high quality oils from the cheaper ones of discount markets.

However, the labelling “extra virgin” even on bottles of discounter olive oils suggests the German consumer the best quality. Since consumers generally are not able to distinguish between the different qualities within the category of “extra virgin olive oil” most of them are not willing to pay more for the same perceived quality and thus buy their olive oil in discount markets instead of in specialised shops.

Nevertheless, as it has been lately reported to the wider German public and as experts in every occasion indicated, the labelling of olive oil with the category of extra virgin is not always justified, especially in the case of discounters’ olive oil. The magazine “Der Feinschmecker” recently tested eight different extra virgin olive oils. Four of them belonged to the group of cheaper retailer brands and the other four belonged to the group of rather expensive producer brands. Using a lately developed analytical method<sup>11</sup> it was proven that in the case of the four retailer brands the labelling “extra virgin” was misused. Two different assigned labs found out a heat treatment of the four cheaper olive oils, which should therefore not be marketed as extra virgin, but as refined olive oils. It should be noted that using the traditional analytical methods all eight olive oils have been legitimately classified as extra virgin olive oil (Der Feinschmecker, 2005).

This recent study confirms the argument that there is some ambiguity concerning the proper labelling of the different classification of olive oil within the EU and the IOOC standards. The traditional methods used for the categorisation of olive oil are not adequate to identify for example heat treatments and thus, leave space to the food retailing to market lower quality olive oil as higher ones. Such activities not only harm the uninformed and unaware German consumers, but mostly the producers of a better quality and thus more expensive olive oil, since it is a typical example of unfair competition.

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<sup>11</sup>It is called after Serani, who developed this method together with two other Italian researchers in 2001. This method is already applied in Italy and Greece.

### **3.3.9 Institutional structure**

The main official body in Germany dealing with questions regarding olive oil is the information agency of olive oil (Informationsgemeinschaft Olivenöl). It is the first and until now the only official agency for olive oil, which is active in the branch for 15 years and is supported by the EU. Its main objective is the promotion of olive oil consumption in Germany. It mostly addresses issues related with quality and nutrition. It undertakes seminars, presentations and consulting services with the aim to make the special characteristics of olive oil, the different qualities and the factors that influence it, well known to the consumers. Together with the German olive oil panel (Deutsches Olivenöl Panel) it organises sensory test groups for the examination of the quality of olive oil ([www.olivenoel-info.net](http://www.olivenoel-info.net)).

Supported by the IOOC the panel was voluntarily founded in 1998. It is responsible for carrying out the so-called panel tests for the categorisation of native olive oil and currently comprises of 12 members and a panel supervisor. The parameters taken into consideration for the sensory tests are the ones set by the IOOC and the EU Regulations for the distinction of olive oil in the different categories. The background of the panel's initiation was the fact that olive oils labelled as "extra virgin" have consistently been flawed products, which could not necessarily be correctly detected in non producing countries, such as Germany. On the basis of voluntary self-controls the panel decided to focus on the examination of native olive oil. Therefore at least 10 times per year 8 – 12 samples of native olive oil are sent to the members and are analysed. If required they contact the producers or traders in order to protect the German consumers. The Panel is certified according to the guidelines of the IOOC ([www.olivenoel-info.net](http://www.olivenoel-info.net)).

Through a specialised fair for olive oil ("OLIO") olive oil producers and importers have the possibility to make their products and activities known to the German public. The "OLIO" has been organised by the magazine "Der Feinschmecker" in the last three years once per year and aims at the promotion of olive oil in the German market. Apart from the exhibition of the products it includes seminars related with gastronomy and the Mediterranean kitchen and with tasting and testing olive oil. The highlight of the fair is the award of the best olive oil for the year.

It should be also noted that there is no association of olive oil importers or suppliers in Germany. Contacting points though especially for small producers and exporters interested in the German market are the embassies and consulates of their countries. The departments of foreign trade of the embassies conduct market studies and have an important role in the information flows between the producers and the German consumers. They are trying to be up-dated regarding the demand in Germany so develop the proper marketing strategies for their countries.

### 3.4 Conclusions

With 82.5 million inhabitants, Germany is of special interest for olive oil producing countries. Due to natural production limitations, the supply of the German market is covered only through imports mostly originating from the Mediterranean basin. Until now Italy is the main source for olive oil in Germany followed by Spain and Greece. It is worth noting though that the positive annual growth of imports originating from non-EU Mediterranean countries along with the gradual liberalisation between the EU and these states under the framework of the Barcelona Agreement leaves open space for further growth of their exports of olive oil to Germany. This combined with their lower production costs in comparison to the EU-Mediterranean member states, provides them with comparative advantages and gives additional possibilities for positive developments of their exports.

Nevertheless, lately interesting for the supply side seem to be efforts of smaller producers and exporters, to export high quality olive oil in Germany under their own brands. This trend combined with the labelling problems could possibly change the scenery of the supply chain in the future splitting it up to more agents with less market dominance and should be definitely taken into account from exporters into the German market. This combined with the general trend observed in the markets of primary commodities that consumers want to know the origin of their products and demand more guarantees for the product quality, is another chance the Mediterranean countries should seize upon. They could raise their profits by exporting directly their own olive oil and thus by-passing big suppliers, which import olive oil in bulks and are then selling it under their own brand names.

Currently the majority of the importers bring in the country already packaged and labelled olive oil and distribute it mainly to the food retail. Major players in the food retailing are the discounters with a share of about 60 % and thus could be characterised as one of the biggest power of the German market of olive oil.

A driving force for the consumption of olive oil is its healthier profile compared to other edible oils. The increasing health conscience along with the adoption of the Mediterranean diet by German consumers is already reflected in the increased consumption of olive oil and the decreased consumption of other edible oils. Another lately observed trend is the increasing demand of olive oil with different aroma.

The majority of olive oil is marketed under retailer brands of either the discounters or the importers, but often of dubious quality. As a study recently indicated there are misuses of the labelling “extra virgin olive oil” opening the discussion for the quality of lower cost olive oils. Obviously the standards of the IOOC and the EU leave space to such mislabelling incidents and need to be reconsidered so as to avoid similar cases in the future and to reassure the food safety for consumers.

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## ANNEX 0-1

**Table 0-1, Edible oils production, imports, exports and domestic supply in The Netherlands 1997-2002**

Vegetable Oil		1997	1998	1999	2000	2001	2002
	Production (Mt)	91,228	100,685	98,962	56,622	51,026	33,76
<i>Coconut Oil</i>	Imports (Mt)	770,505	1,526,099	768,056	1,528,783	1,234,521	1,033,119
	Exports (Mt)	301,468	693,159	275,711	671,389	396,17	341,868
	D. Supply (Mt)	596,982	926,606	594,751	922,451	880,728	732,064
	Production (Mt)	50,934	67,919	36,454	47,085	77,49	67,354
<i>Groundnut Oil</i>	Imports (Mt)	206,498	182,978	187,722	179,918	162,359	175,426
	Exports (Mt)	75,934	74,895	57,752	53,931	61,401	54,829
	D. Supply (Mt)	182,197	167,329	166,711	166,081	160,592	165,291
	Production (Mt)	2,420,720	1,901,310	1,956,063	2,134,626	2,661,299	1,947,253
<i>Olive Oil</i>	Imports (Mt)	772,832	703,895	768,194	772,774	842,112	851,14
	Exports (Mt)	804,157	800,472	757,076	930,705	1,007,222	1,057,160
	D. (Mt)	1,804,650	1,850,533	1,865,937	1,985,869	2,057,154	1,949,209
	Production (Mt)	2,797	428	311	166	395	765
<i>Palmkernel Oil</i>	Imports (Mt)	424,478	396,558	512,906	518,22	502,213	641,477
	Exports (Mt)	58,492	76,939	77,923	56,321	37,182	74,35
	D. Supply (Mt)	368,647	320,155	435,165	441,663	463,221	572,492
	Production (Mt)	3,040,345	3,219,391	3,747,942	3,676,594	4,693,753	5,140,241
<i>Palm Oil</i>	Imports (Mt)	1,330,806	1,189,862	1,650,149	1,209,978	1,829,670	2,097,841
	Exports (Mt)	1,901,336	1,989,671	2,100,693	2,480,131	2,861,169	3,063,782
	Production (Mt)	3,025,138	3,410,566	3,674,861	3,762,811	3,568,958	3,707,057
	Imports (Mt)	1,276,161	1,139,746	1,328,233	1,371,501	1,626,406	1,488,423
<i>Rape and Mustard Oil</i>	Exports (Mt)	2,297,605	2,302,352	2,443,932	2,258,312	1,966,992	2,348,945
	D. Supply (Mt)	2,057,153	2,226,094	2,591,369	2,867,684	3,168,334	2,851,669
	Production (Mt)	2,650,455	2,902,962	2,834,973	2,715,237	3,075,525	3,032,381
	Imports (Mt)	605,162	708,959	673,771	783,019	699,613	998,295
<i>Soyabean Oil</i>	Exports (Mt)	1,622,513	1,815,198	1,888,868	1,908,431	1,895,102	2,140,740
	D. Supply (Mt)	1,649,000	1,698,080	1,571,450	1,495,309	1,816,168	1,875,529
	Production (Mt)	2,467,077	2,203,873	2,063,441	2,065,211	2,016,218	1,465,867
	Imports (Mt)	808,874	872,178	1,121,159	844,648	1,294,196	1,688,112
<i>Sun-flowerseed Oil</i>	Exports (Mt)	1,394,281	986,968	975,192	892,19	1,163,899	973,211
	D. Supply (Mt)	1,889,925	1,802,306	2,071,696	2,050,619	2,102,647	2,150,688
	Production (Mt)	11,693,350	11,642,501	11,800,912	11,882,712	12,566,153	11,329,831
	Imports (Mt)	9,452,966	10,450,105	10,828,540	11,488,361	12,599,003	13,694,670
<i>Vegetable oils</i>	Exports (Mt)	9,000,203	9,085,709	9,394,761	9,325,072	9,536,489	10,341,528
	D. Supply (Mt)	11,930,620	12,579,702	12,955,217	13,947,008	15,051,186	14,868,025
	Feed (Mt)	115	161	149	95,076	121,797	170,801
	Food Manufacture (Mt)	97,785	91,414	89,121	98,847	80,377	89,602
	Food (Mt)	7,609,199	7,493,255	7,486,498	7,662,588	7,652,843	7,751,941
	Other Uses (Mt)	4,171,557	4,864,474	5,313,056	6,299,331	7,418,308	6,978,680

Source FAOSTAT, FAO 2005

**Table 0-2 Domestic supply of olive oils in the Netherlands 1997-2002**

Table 2.

<i>Domestic Supply (Mt)</i>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>
<i>Coconut Oil</i>	596,982	926,606	594,751	922,451	880,728	732,064
<i>Groundnut Oil</i>	182,197	167,329	166,711	166,081	160,592	165,291
<i>Olive Oil</i>	1,804,650	1,850,533	1,865,937	1,985,869	2,057,154	1,949,209
<i>Palmkernel Oil</i>	368,647	320,155	435,165	441,663	463,221	572,492
<i>Palm Oil</i>	1,901,336	1,989,671	2,100,693	2,480,131	2,861,169	3,063,782
<i>Rape and Mustard Oil</i>	2,057,153	2,226,094	2,591,369	2,867,684	3,168,334	2,851,669
<i>Soyabean Oil</i>	1,649,000	1,698,080	1,571,450	1,495,309	1,816,168	1,875,529
<i>Sunflowerseed Oil</i>	1,889,925	1,802,306	2,071,696	2,050,619	2,102,647	2,150,688
<i>Vegetable Oil</i>	11,930,620	12,579,702	12,955,217	13,947,008	15,051,186	14,868,025

Source FAOSTAT, FAO 2005

**Table 0-3 Edible oils and fats imports in the Netherlands 1997 -2003***Imports – Qty (Mt)*

	1997	1998	1999	2000	2001	2002	2003
<i>Animal Vegetable Oil -4</i>	9,959,014	10,860,210	11,004,521	11,715,968	12,695,229	13,759,615	14,090,347
<i>Animal Oil+Fat+Grs</i>	663,012	945,576	710,892	944,028	890,499	908,414	983,079
<i>Butter</i>	696,567	657,293	668,492	698,404	664,243	654,356	754,012
<i>Lard+Fat,Pig+Poult</i>	230,692	249,623	262,488	236,47	225,346	214,847	254,607
<i>Margarine etc</i>	506,193	527,528	528,496	537,661	535,583	606,761	710,497
<i>Oil of Coconuts</i>	663,012	945,576	710,892	944,028	890,499	908,414	983,079
<i>Oil of Groundnuts</i>	200,39	178,337	185,438	176,126	150,541	173,377	175,756
<i>Oil of Linseed</i>	67,405	71,557	79,993	88,091	81,829	106,08	108,468
<i>Oil of Palm</i>	2,017,119	2,406,909	2,435,005	2,834,863	3,487,007	3,595,571	3,889,641
<i>Oil of Palm Kernels</i>	419,203	384,924	488,157	489,967	469,758	620,162	671,485
<i>Oil of Rapeseed</i>	1,025,106	989,823	1,047,976	1,132,222	1,415,670	1,360,794	1,162,308
<i>Oil of Soya Beans</i>	556,52	647,977	600,751	600,165	660,226	757,608	765,737
<i>Oil of Sunflower Seed</i>	753,514	826,317	923,373	801,87	926,255	1,449,994	1,424,960
<i>Processed Oils -43</i>	2,129,138	2,304,286	2,519,169	2,507,371	2,545,881	2,717,883	2,831,049

Source FAOSTAT, FAO 2005

**Table 0-4 Edible oils and fats exports from the Netherlands 1997 -2003***Exports - Qty (Mt)*

	1997	1998	1999	2000	2001	2002	2003
<i>Animal Vegetable Oil -4</i>	9,071,377	9,048,385	9,483,742	9,595,643	9,680,764	10,458,149	10,257,411
<i>Animal Oil+Fat+Grs</i>	805,533	798,15	797,147	852,876	788,393	949,005	1,006,668
<i>Butter</i>	765,338	718,992	692,079	660,345	688,399	673,532	839,572
<i>Lard+Fat,Pig+Poult</i>	224,334	248,128	269,118	239,75	230,926	310,578	377,238
<i>Margarine etc</i>	1,124,433	1,058,352	813,243	814,777	759,543	983,149	1,034,901
<i>Oil of Coconuts</i>	99,694	118,066	147,326	134,618	135,398	157,269	203,23
<i>Oil of Groundnuts</i>	58,641	61,31	52,136	44,576	49,917	47,346	57,305
<i>Oil of Linseed</i>	167,057	162,966	174,853	161,074	131,916	154,718	152,805
<i>Olive Oil, Total</i>	804,157	800,472	757,076	930,705	1,007,222	1,057,160	1,018,579
<i>Oil of Palm</i>	572,324	552,185	626,312	590,461	655,668	675,625	850,163
<i>Oil of Palm Kernels</i>	17,008	11,215	14,542	12,783	10,781	21,035	20,593
<i>Oil of Rapeseed</i>	1,719,247	1,837,699	1,976,752	1,715,134	1,691,551	2,022,643	1,553,456
<i>Oil of Soya Beans</i>	1,414,743	1,622,022	1,656,292	1,559,908	1,778,181	1,787,565	1,594,218
<i>Oil of Sunflower Seed</i>	1,285,799	912,58	877,606	847,368	816,966	826,001	843,618

Source FAOSTAT, FAO 2005



**Table 0-5 Olive oil domestic supply in EU-25 countries 1990 -2002**

<i>Olive Oil</i> <i>Domestic Supply (Mt / per 1000 capita)</i>	Year									
	1990	1991	1992	1995	1996	1997	1999	2000	2001	2002
<b>Austria</b>	0.17	0.16	0.20	0.06	0.14	0.30	0.46	0.54	0.57	0.49
<b>Belgium</b>								1.37	1.43	1.42
<b>Belgium-Luxembourg</b>	0.20	0.22	0.30	0.55	0.65	0.71	1.25			
<b>Denmark</b>	0.12	0.15	0.28	0.15	0.25	0.53	0.38	0.47	0.57	0.56
<b>Finland</b>	0.02	0.03	0.04	0.06	0.06	0.10	0.15	0.14	0.17	0.19
<b>France</b>	0.62	0.53	0.58	0.77	0.81	1.14	1.32	1.39	1.64	1.61
<b>The Netherlands</b>	0.11	0.12	0.14	0.19	0.21	0.22	0.39	0.39	0.44	0.49
<b>Greece</b>	20.54	22.83	22.12	21.92	24.01	22.37	24.59	26.34	27.34	28.49
<b>Ireland</b>	0.09	0.16	0.26	0.33	0.36	0.40	0.37	0.41	0.47	0.67
<b>Italy</b>	12.89	13.35	11.98	12.61	12.20	13.35	13.51	13.86	14.15	14.35
<b>Netherlands</b>	0.07	0.08	0.10	0.15	0.15	0.24	0.47	0.38	0.48	0.51
<b>Portugal</b>	4.43	4.37	4.11	5.04	4.41	4.50	5.27	5.00	5.56	5.32
<b>Spain</b>	11.22	12.50	12.83	13.11	14.86	15.47	14.70	16.25	16.63	13.38
<b>Sweden</b>	0.09	0.11	0.10	0.13	0.14	0.26	0.37	0.31	0.52	0.59
<b>United Kingdom</b>	0.12	0.12	0.18	0.27	0.26	0.45	0.52	0.72	0.63	0.57
<b>Cyprus</b>	2.60	2.92	3.50	2.46	3.04	1.81	2.12	1.71	2.65	2.29
<b>Czech Republic</b>				0.03	0.02	0.02	0.02	0.04	0.03	0.06
<b>Estonia</b>			0.08	0.26	0.35	0.04	0.08	0.04	0.05	0.05
<b>Hungary</b>	0.00	0.00	0.00	0.01	0.01	0.01	0.01	0.02	0.02	0.03
<b>Latvia</b>			0.00	0.01	0.03	0.09	0.02	0.05	0.10	0.10
<b>Lithuania</b>			0.05	0.00	0.01	0.01	0.02	0.03	0.04	0.04
<b>Malta</b>	0.59	0.58	0.69	0.42	0.38	0.39	0.71	0.96	0.95	0.92
<b>Poland</b>	0.16	0.02	0.08	0.02	0.01	0.02	0.02	0.04	0.04	0.05
<b>Slovakia</b>				0.01	0.01	0.01	0.01	0.02	0.02	0.02
<b>Slovenia</b>			0.08	0.15	0.19	0.28	0.27	0.26	0.96	0.28

Source FAOSTAT, FAO 2005

**Table 0-6 Edible oils and fats average per capita consumption in EU-25 countries in 2002**

Year: 2002	<i>Vegetable Oils TOTAL</i>	<i>Sunflowerseed Oil</i>	<i>Soyabean Oil</i>	<i>Rape and Mustard Oil</i>	<i>Olive Oil</i>	<i>Groundnut Oil</i>	<i>Coconut Oil</i>		<i>Butter, Ghee</i>	<i>Animal Fats</i>
<i>Food (Mt / per 1000 capita)</i>										
<b>Austria</b>	18.20	4.11	3.70	5.72	0.49	0.19	0.40		4.88	16.28
<b>Belgium</b>	23.65	3.03	4.76	5.93	1.26	0.04	1.54		6.31	26.28
<b>Cyprus</b>	15.03	2.39	4.47	2.13	2.73	0.05			1.36	3.44
<b>Czech Republic</b>	16.03	1.84	3.45	10.28	0.12	0.11			4.71	10.02
<b>Denmark</b>	6.68	0.09	0.87	2.97	0.50	0.05	0.00		1.68	27.34
<b>Estonia</b>	8.11	0.42	2.85		0.06	0.00	0.00		2.82	5.33
<b>Finland</b>	9.69	0.99	3.13	0.75	0.18	0.00	0.88		3.22	11.74
<b>France</b>	18.31	7.22	1.64	2.84	1.61	0.81	0.00		8.36	18.69
<b>The Netherlands</b>	18.58	3.03	4.27	6.09	0.47	0.18	2.75		6.72	21.90
<b>Greece</b>	28.34	4.54	0.52		18.29	0.33			1.02	3.13
<b>Hungary</b>	15.71	9.01	1.42	1.91	0.07	0.00			1.01	25.84
<b>Ireland</b>	14.86	2.64	1.28	6.45	0.67	0.03	3.42		2.81	13.11
<b>Italy</b>	27.43	4.64	3.92	1.40	13.23	0.86	0.65		2.98	11.00
<b>Latvia</b>	13.46	2.74	3.88	6.17	0.19	0.00			2.62	16.83
<b>Lithuania</b>	10.60	1.47	3.28	4.69	0.05	0.01	0.20		2.71	11.85
<b>Malta</b>	7.54	1.84	2.29		1.21	0.01	0.01		0.86	11.89
<b>Netherlands</b>	17.15	1.09	6.26	1.23	0.46	2.49	1.74		1.92	9.34
<b>Poland</b>	12.38	1.00	3.63	5.57	0.05	0.02	0.10		4.48	14.87
<b>Portugal</b>	17.14	5.31	3.52		4.55	0.29	0.00		2.17	13.60
<b>Slovakia</b>	13.56	2.23	1.69	8.76	0.05	0.41			3.38	16.58
<b>Slovenia</b>	8.15	1.04	5.04	1.29	0.47	0.10			1.42	16.96
<b>Spain</b>	26.79	9.76	4.03	0.12	11.27	0.01	0.77		0.84	5.18
<b>Sweden</b>	15.93	1.17	1.19	11.77	0.59	0.08	0.03		3.59	16.33
<b>United Kingdom</b>	17.02	1.69	3.17	8.57	0.45	0.09	0.33		2.99	7.07

Source FAOSTAT, FAO 2005

**Table 0-7 Trends in edible oils and fats average per capita consumption in EU-15 1990 -2002**

<b>European Union (15)</b>	<b>Year</b>												
<i>Food (Mt / per 1000 capita)</i>	<b>Year</b>												
	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>
<i>Sunflowerseed Oil</i>	4.09	4.25	4.49	4.34	4.06	4.19	4.24	4.58	4.05	4.31	4.63	4.46	4.38
<i>Soyabean Oil</i>	3.69	4.04	3.44	3.45	3.61	3.76	3.91	3.47	3.31	3.03	2.79	3.41	3.39
<i>Rape and Mustard Oil</i>	2.12	2.70	3.69	3.47	3.34	3.24	3.87	4.26	4.52	4.25	4.28	3.90	4.07
<i>Olive Oil</i>	3.84	3.90	3.77	3.88	3.97	3.90	3.89	4.06	4.18	4.24	4.35	4.42	4.40
<i>Coconut Oil</i>	0.52	0.32	0.45	0.65	0.33	0.59	0.79	0.74	0.62	0.86	0.75	0.95	1.00
<i>Groundnut Oil</i>	0.62	0.62	0.63	0.60	0.55	0.53	0.49	0.49	0.45	0.45	0.45	0.43	0.45
<i>Animal Fats</i>	13.80	13.69	13.95	13.79	13.90	14.04	13.93	14.14	14.31	14.32	13.92	14.02	14.02
<i>Butter, Ghee</i>	4.81	4.55	4.52	4.44	4.48	4.54	4.57	4.48	4.55	4.53	4.59	4.51	4.42

Source FAOSTAT, FAO 2005

**Table 0-8: Imports of virgin olive oil (HS150910) in The Netherlands from country of origin**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
WORLD	13822	14518	12361	16055	25448	4714	5774	5533	6518	7905	3.2	100,0	100,0	14.1	12.2
ITALY	1729	2324	2468	4658	9546	463	795	1201	1792	3177	3.0	37,5	40,2	50.9	59.4
GERMANY	3746	3844	3014	2794	6179	1195	1525	1538	1255	1445	4.3	24,3	18,3	7.1	1.9
SPAIN	3605	3588	3162	3277	5737	1240	1491	1414	1367	1966	2.9	22,5	24,9	8.7	8.7
UNTD KINGDOM	3904	4324	3176	3709	2750	1348	1820	1165	1423	931	3.0	10,8	11,8	-8.2	-9.4
GREECE	114	29	215	1281	605	196	8	94	556	201	3.0	2,4	2,5	103.9	53.6
BELGIUM	211	81	158	153	250	60	28	60	75	85	2.9	1,0	1,1	10.2	18.3
MOROCCO	224	235	109	61	87	98	86	45	23	36	2.4	0,3	0,5	-27.7	-28.3
FRANCE	149	73	38	78	176	47	16	9	16	48	3.7	0,7	0,6	4.1	.4
TURKEY	140	13	4	26	9	67	4	2	8	3	3.0	0,0	0,0	-38.1	-42.4
SOUTH AFRICA	0	0	0	0	76	0	0	0	0	6	12.7	0,3	0,1	*	*
Med. Countries	364	248	113	87	96	165	90	47	31	39					
MOROCCO	224	235	109	61	87	98	86	45	23	36	2.4	0,5	0,3	-27.7	-28.3
TURKEY	140	13	4	26	9	67	4	2	8	3	3.0	0,0	0,0	-38.1	-42.4

Source: PC-TAS

**Table 0-9: Imports of olive oil and its fractions refined but not chemically modified (HS150990) in The Netherlands from county of origin**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
WORLD	7364	6783	6463	12002	13112	2681	2827	3008	4825	4450	2.9	100,0	100,0	18.8	16.7
ITALY	3703	3091	2803	5266	4735	1160	1313	1366	2239	1537	3.1	36,1	34,5	10.8	11.6
SPAIN	3156	2898	2101	2579	3246	945	1177	919	1102	1191	2.7	24,8	26,8	-6	4.0
UNTD KINGDOM	104	495	1209	2322	3476	277	227	628	1115	1239	2.8	26,5	27,8	135.5	58.2
GERMANY	222	238	316	1717	1293	77	94	86	320	347	3.7	9,9	7,8	73.3	52.7
BELGIUM	65	2	14	84	225	195	1	6	38	90	2.5	1,7	2,0	86.3	23.3
GREECE	96	47	7	8	3	24	15	3	3	1	3.0	0,0	0,0	-58.1	-54.9
FRANCE	7	2	2	19	64	1	0	0	7	20	3.2	0,5	0,4	95.0	*

Source: PC-TAS

**Table 0-10: Imports of oils & their fractions obtained from olives, refined (HS151000) in The Netherlands from country of origin**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	1426	1319	3052	3736	3692	457	643	1430	1469	1229	3,0	100,0	100,0	34,2	32,4
top 10 partners															
-Italy	759	1049	2776	3472	3372	290	539	1328	1366	1138	3,0	91,3	92,6	51,9	44,3
-France	226	44	106	56	46	52	14	37	16	10	4,6	1,2	0,8	-25,5	-27,1
-Greece	185	110	18	54	42	41	49	6	18	10	4,2	1,1	0,8	-30,8	-31,8
-Austria	75	30	51	39	36	16	8	13	18	4	9,0	1,0	0,3	-11,4	-17,8
-United Kingdom	27	40	48	56	24	10	19	21	19	9	2,7	0,7	0,7	1,0	-2,1
-Spain	23	8	13	39	70	12	4	3	18	24	2,9	1,9	2,0	46,4	33,5
-Portugal	113	0	0	0	24	29	0	0	0	1	24,0	0,7	0,1*	*	
<i>Med. Countries</i>	0	0	0	0	0	0	0	0	0	0	0,0	0,0	0,0*	*	

Source: PC-TAS

**Table 0-11: Export destinations of virgin olive oil (HS150910) from The Netherlands**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
WORLD	1274	1124	1266	1996	2511	446	534	633	948	905	2.8	100,0	100,0	21.3	22.0
GERMANY	527	625	672	1202	996	189	322	349	528	345	2.9	39,7	38,1	21.3	18.5
ITALY	568	452	479	433	399	199	192	247	198	135	3.0	15,9	14,9	-7.2	-7.2
SPAIN	95	7	17	174	963	27	6	13	79	351	2.7	38,4	38,8	119.1	116.1
BELGIUM	11	16	30	94	84	5	4	21	82	58	1.4	3,3	6,4	79.3	120.8
FRANCE	64	13	7	62	52	21	3	2	10	8	6.5	2,1	0,9	12.2	-7.0
UNTD KINGDOM	0	0	60	23	0	0	0	0	45	0	*	0,0	0,0	*	*

Source: PC-TAS

**Table 0-12: Export destinations of olive oil and its fractions refined but not chemically modified (HS150990) from The Netherlands**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
WORLD	278	191	255	236	501	76	54	108	107	214	2.3	100,0	100,0	14.9	31.7
<i>top 10 partners</i>															
GERMANY	77	85	81	59	85	26	25	29	32	38	2.2	17,0	17,8	-1.7	10.6
BELGIUM	34	12	21	18	164	8	4	26	10	50	3.3	32,7	23,4	42.7	58.1
FRANCE	12	12	16	39	63	1	1	2	7	14	4.5	12,6	6,5	56.8	105.9
UNTD KINGDOM	21	16	14	24	57	6	3	4	11	27	2.1	11,4	12,6	27.2	53.8

Source: PC-TAS

**Table 0-13: Export destinations of oils & their fractions obtained from olives, refined (HS151000) from The Netherlands**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
WORLD	201	159	34	11	93	80	123	47	5	69	1.3	100,0	100,0	-34.4	-29.5
BELGIUM	149	146	3	0	8	51	117	1	0	16	.5	8,6	23,2	*	*
GERMANY	0	0	6	0	61	0	0	44	0	43	1.4	65,6	62,3	*	*

Source: PC-TAS

**Table 0-14: Olive oil importers in The Netherlands, 2005**

- 1) Carbonell Nederland BV, Nieuw-Vennep, Nederland
- 2) [www.blauel.gr](http://www.blauel.gr)
- 3) Super kwaliteit olijfolie, [www.hetbestevanitalie.nl](http://www.hetbestevanitalie.nl)
- 4) Olive Oils, [www.vea.es](http://www.vea.es)
- 5) Agro Eco Consultancy, BENNEKOM
- 6) Casa Lisetta Zevenbergschen Hoek
- 7) De Burg B.V., HEERHUGOWAARD,
- 8) De Oliehoorn B.V., ZWAAG
- 9) Diamant, ROTTERDAM,
- 10) Epifine BV, UTRECHT
- 11) Oil & Vinegar Groningen, GRONINGEN,
- 12) Slagerij J.B.H.M. van Beijsterveldt, BREDA,
- 13) Van Raalten Import, Amsterdam
- 14) Zeitz International Handelsonderneming bv, OUDENBOSCH,
- 15) Droste's Hotel & Restaurant, TUBBERGEN,
- 16) Ibromar, Rotterdam,
- 17) Megfish, Ijmuiden,
- 18) Deutsche Gesellschaft fur Fettwissenschaft, DGF, [www.dgfett.de](http://www.dgfett.de), Vlaardingen,
- 19) Anova, [www.hansenbv.nl](http://www.hansenbv.nl), S Hertogenbosch, Nederland
- 20) Globeloper, Nederland

Specialised Olive oil retail shops:

- 21) [www.bramasole.nl](http://www.bramasole.nl)
- 22) [www.cookery.nl](http://www.cookery.nl)
- 23) [www.culinaryshop.nl](http://www.culinaryshop.nl)
- 24) [www.lindenhoff.nl](http://www.lindenhoff.nl)

**Table 0-15 Evaluation table of olive oil expert panel test in The Netherlands**

Brand name / type	Available at :	Price (by 500 ml)	Evaluation mark
<i>1 HEMA Eleolado extra partheno</i>	HEMA	€4,95	8,0
<i>2 AH - extra vierge</i>	Albert Heijn	€2,99	6,4
<i>3 Bertolli - extra vergine</i>	Widely available	€3,89	6,4
<i>4 Edah - extra vierge</i>	Edah	€2,38	6,3
<i>5 Fratelli Sanma - extra vergine</i>	Xenos	€2,79	5,6
<i>6 Carbonell - extra virgen</i>	Widely available	€3,59	5,6
<i>7 Euroshopper - extra vierge</i>	Albert Heijn	€1,43	4,8
<i>8 Biorganic - extra vierge</i>	C1000, Plus, Vomar and DeWitKomart	€4,55	4,6
<i>9 Fuchs Cuisine - extra vierge</i>	C1000	€1,40	4,2
<i>10 La Villa - extra vergine</i>	Aldi	€1,39	4,0

Source: <http://kassa.vara.nl> (expert panel research on TV program, in The Netherlands, (10-04-2004).



## ANNEX 0-2

**Table 0-16: Imports of virgin olive oil (HS150910) in Germany from country of origin**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	69,978	49,390	102,540	102,982	115,544	24,168	18,564	41,160	39,383	34,329	3.4	100.0	100.0	19.0	15.7
<i>top 10 partners</i>															
-Italy	58,516	43,809	93,235	93,304	102,030	18,146	16,431	37,376	35,680	30,271	3.4	88.3	88.2	20.5	19.7
-Spain	6,205	2,862	4,684	4,350	6,433	3,108	1,276	2,203	2,019	2,145	3.0	5.6	6.2	5.0	-2.8
-Greece	1,768	1,544	2,774	2,780	3,868	454	530	1,007	973	1,089	3.6	3.3	3.2	24.0	26.6
-France	1,247	511	1,162	1,630	1,401	337	149	337	432	323	4.3	1.2	0.9	14.9	10.3
-Belgium	1,554	0	4	41	248	1,911	0	2	38	86	2.9	0.2	0.3*	*	
-Austria	111	247	93	366	262	18	37	22	94	58	4.5	0.2	0.2	23.5	38.7
-Netherlands	38	138	126	211	418	12	57	48	63	121	3.5	0.4	0.4	68.5	60.3
-Turkey	206	33	70	74	290	113	10	28	25	83	3.5	0.3	0.2	16.1	3.0
-Portugal	160	192	129	45	113	42	62	44	19	41	2.8	0.1	0.1	-19.3	-11.6
-Denmark	0	0	5	80	156	0	0	2	10	18	8.7	0.1	0.1*	*	
<i>Med. Countries</i>	285	34	253	85	445	124	10	101	31	124	3.6	0.4	0.4	19.8	12.0
-Turkey	206	33	70	74	290	113	10	28	25	83	3.5	0.3	0.2	16.1	3.0
-Tunisia	8	0	140	0	58	2	0	67	0	21	2.8	0.1	0.1*	*	
-Israel	71	1	43	0	36	9	0	6	0	5	7.2	0.0	0.0*	*	
-Lebanon	0	0	0	11	61	0	0	0	6	15	4.1	0.1	0.0*	*	

Source: PC-TAS

**Table 0-17: Imports of olive oil and its fractions refined but not chemically modified (HS150990) in Germany from county of origin**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	34,192	31,534	5,934	6,358	12,602	10,797	1,3254	2,732	2,488	3,909	3.2	100.0	100.0	-30.2	-31.0
<i>top 10 partners</i>															
-Italy	29,485	29,114	2,571	4,756	7,004	9,178	12,211	1,108	1,802	1,928	3.6	55.6	49.3	-37.4	-39.6
-Spain	3,383	1,385	2,123	695	2,870	1,192	632	1,158	378	1,059	2.7	22.8	27.1	-9.7	-7.2
-Greece	444	582	628	375	883	138	255	255	128	273	3.2	7.0	7.0	9.8	7.0
-France	213	289	437	420	347	65	90	140	134	97	3.6	2.8	2.5	14.5	12.7
-United Kingdom	16	81	50	18	1,022	3	24	17	8	419	2.4	8.1	10.7	97.6	140.6
-Netherlands	244	32	73	5	68	71	15	36	1	37	1.8	0.5	0.9	-35.7	-33.0
-Denmark	32	12	0	0	293	19	6	0	0	50	5.9	2.3	1.3*	*	
-India	263	0	0	0	0	82	0	0	0	0*		0.0	0.0*	*	
-Turkey	17	0	11	66	5	7	0	4	32	2	2.5	0.0	0.1*	*	
-Belgium	9	17	10	0	51	4	11	5	0	18	2.8	0.4	0.5*	*	
<i>Med. Countries</i>															
-Turkey	17	0	11	66	5	7	0	4	32	2	2.5	0.0	0.1*	*	

Source: PC-TAS

**Table 0-18: Imports of oils & their fractions obtained from olives, refined (HS151000) in Germany from country of origin**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	1,426	1,319	3,052	3,736	3,692	457	643	1,430	1,469	1,229	3.0	100.0	100.0	34.2	32.4
top 10 partners															
-Italy	759	1,049	2,776	3,472	3,372	290	539	1,328	1,366	1,138	3.0	91.3	92.6	51.9	44.3
-France	226	44	106	56	46	52	14	37	16	10	4.6	1.2	0.8	-25.5	-27.1
-Greece	185	110	18	54	42	41	49	6	18	10	4.2	1.1	0.8	-30.8	-31.8
-Austria	75	30	51	39	36	16	8	13	18	4	9.0	1.0	0.3	-11.4	-17.8
-United Kingdom	27	40	48	56	24	10	19	21	19	9	2.7	0.7	0.7	1.0	-2.1
-Spain	23	8	13	39	70	12	4	3	18	24	2.9	1.9	2.0	46.4	33.5
-Portugal	113	0	0	0	24	29	0	0	0	1	24.0	0.7	0.1*	*	
Med. Countries	0	0	0	0	0	0	0	0	0	0	0.0	0.0	0.0*	*	

Source: PC-TAS

**Table 0-19: Export destinations of virgin olive oil (HS150910) from Germany**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	1,716	1,191	5,042	2,453	4,103	548	340	2,141	701	914	4.5	100.0	100.0	28.0	19.1
top 10 partners															
-Italy	346	42	3,152	130	165	245	16	1,575	40	67	2.5	4.0	7.3	-3.5	-15.4
-Austria	271	160	437	699	1,957	70	39	110	139	374	5.2	47.7	40.9	72.1	58.8
-Netherlands	164	164	418	417	561	37	50	153	181	196	2.9	13.7	21.4	40.4	58.7
-Switzerland	248	228	252	267	447	43	46	52	47	61	7.3	10.9	6.7	14.3	7.5
-France	293	42	167	145	194	66	11	64	49	55	3.5	4.7	6.0	4.2	12.0
-Ireland	71	71	85	84	122	17	20	25	25	30	4.1	3.0	3.3	13.3	14.6
-Luxembourg	1	69	104	86	141	0	20	32	32	42	3.4	3.4	4.6	175.0*	
-United Kingdom	63	48	38	83	119	14	13	10	21	18	6.6	2.9	2.0	20.0	10.3
-Czech Rep.	35	75	33	84	36	10	34	17	35	11	3.3	0.9	1.2	1.7	2.2
-Norway	28	43	63	40	85	5	7	19	7	11	7.7	2.1	1.2	24.0	17.1
Med. Countries															

Source: PC-TAS

**Table 0-20: Export destinations of olive oil and its fractions refined but not chemically modified (HS150990) from Germany**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	2,054	906	743	482	1,355	1,083	307	321	196	418	3.2	100.0	100.0	-13.6	-21.0
<i>top 10 partners</i>															
-Netherlands	124	118	137	136	728	36	44	55	57	257	2.8	53.7	61.5	44.5	52.0
-Italy	1,179	21	4	0	0	792	5	1	0	0*		0.0	0.0*	*	*
-Austria	71	399	229	29	61	20	114	85	6	18	3.4	4.5	4.3	-25.4	-27.1
-France	199	105	73	8	41	69	41	42	5	15	2.7	3.0	3.6	-43.6	-40.3
-Switzerland	47	43	43	55	70	14	13	11	17	7	10.0	5.2	1.7	11.0	-10.6
-Israel	88	4	16	24	13	25	1	5	8	3	4.3	1.0	0.7	-18.4	-19.4
-Belgium	62	10	18	11	36	21	3	7	3	9	4.0	2.7	2.2	-9.4	-15.6
-Czech Rep.	41	0	12	15	68	15	0	6	6	17	4.0	5.0	4.1*	*	*
-Brazil	2	0	0	15	72	0	0	0	5	19	3.8	5.3	4.5*	*	*
-Spain	51	0	30	0	0	20	0	18	0	0*		0.0	0.0*	*	*
<i>Med. Countries</i>															
-Israel	88	4	16	24	13	25	1	5	8	3	4.3	1.0	0.7	-18.4	-19.4

Source: PC-TAS

**Table 0-21: Export destinations of oils & their fractions obtained from olives, refined (HS151000) from Germany**

Partner country	Value (in 1000 US \$)					Quantity (in tonnes)					V/Q in % (2003)	Share in % (2003)		Trend in %	
	1999	2000	2001	2002	2003	1999	2000	2001	2002	2003		Value	Quantity	Value	Quantity
world	46	82	75	70	110	23	38	63	35	40	2.8	100.0	100.0	17.2	10.8
<i>Med. Countries</i>															

Source: PC-TAS

**Table 0-22: Olive oil importers in Germany, 2005**

<b>Company name</b>	<b>Comments</b>
A. Sander & Co. GmbH	
Aktuell Vertriebs-GmbH	Supplier of food retailing
Alisa GmbH	
Almasol Deutschland	
Andrzej Pilecki Import-Export	
Andu-Pez Lebensmittel GmbH	
Anduronda Import GmbH	
Ars Gustandi Detlef Rick GmbH	
Barrique Weinimport GmbH	
Barth Feinkost GmbH	
Bernhard Möllers GmbH & Co. KG	
Bestfoods GmbH & Co. KG	
BLM Prod.- u. Vertriebsges. mbH	Supplier of food retailing
Bohl, Ruth GmbH	Supplier of specialised shops
Bonvino Weinvertrieb u. Weinhandel	Supplier of specialised shops
Bouquet Garni – Feinkostverband Paula Lederer	
Brändle GmbH	
Bremer, Harald L.	Supplier of specialised shops
Carl Geiger GmbH & Co. KG	
Clama GmbH & Co. KG	Supplier of food retailing
Culinaria Delikatessen Service GmbH	Supplier of food retailing
Damak Lebensmittelvertriebsges.	
D'Amico Spezialitäten GmbH	Supplier of food retailing
Das Weinkabinett	
Der Mallorquiner	
Di Gennaro Feinkost- & Weinimport GmbH	Supplier of specialised shops
Die Olive - und mehr e.K.	Supplier of specialised shops
Dunekacke & Wilms Nachf. GmbH & Co. KG	Supplier of food retailing
El Paladar –Esteban Ruiz- Import	
EMA GmbH	Supplier of food retailing
Epicerie Fine	Supplier of specialised shops
eterna Nahrungsmittel GmbH	Supplier of food retailing
Euro Atlantic Import-Export Food Handels GmbH	
Fantone Feines Olivenöl	Supplier of specialised shops
Fäustle Import	
Fripa Vertribs GmbH	
Garibaldi - Eberhard Spangenberg	Supplier of specialised shops
Graf, Alfred	Supplier of food retailing
Grudis GmbH	
Grünsfelder Ölmühle GmbH	
Günther Hellriegel GmbH	
GZ Online – Gerhard Ziegler	
Henry Lamotte GmbH	
Holtmann Feinkost GmbH	
Horace M. Ostwald	

**Table 0-22: - continued -**

Horst Küper GmbH Import	
Il Nuraghe GmbH	Supplier of specialised shops
Imex Handelsges. mbH	Supplier of food retailing
Importhaus für Delikatessen Wolfram Berge GmbH & CO KG	
Interfood GmbH	
Irene C. L. Bleickert	
Kattus, Theodor GmbH	Supplier of food retailing
Klemann GmbH	Supplier of specialised shops
Krini - A. Kristallidis GmbH feine Spezialitäten	Supplier of food retailing
Macha Weine & Feines	Supplier of specialised shops
Maren Encinas KG	
Marmara Import-Export GmbH	
Minerva Deutschland Olivenöl GmbH	Supplier of food retailing
Moreno GmbH & Co. KG	
Ölbaum	Supplier of specialised shops
Olive E Più Marzak KG	Supplier of specialised shops
Olivia's-Florian Schüssler	
Ölmühle Solling GmbH	
Olmühle Walz GmbH	
Otto Franck Import KG	
Ralf Bos Food	
Raoul Rousso GmbH	
Reichold Feinkost, Feinkost Dittmann GmbH	
Reina Vertrieb-José Reine Diaz	
Rekru Brennerei-Kellereibedarf am Bodensee	
Rila Feinkost-Importe GmbH & Co. KG	Supplier of food retailing
Romina Foods Import GmbH	
Ronald Schubbert	
Rungis Express GmbH	
Ruth Bohl GmbH – Delikatessen –u. Spezialitäten Import	
Samsel Vertriebs GmbH & Co. KG	
Santos Lebensmittel Import GmbH	
Sektkellerei Jürgen Weisenborn	
Silca Import AG	
Siller & Boeckheler	
Simon, Evers & Co. GmbH	
Smart Food & Drink GmbH	Supplier of specialised shops
Sol Im.-u. Export GmbH	
Spanischer Garten Import GmbH	
St. Josef Imp.-u. Export Handelsges.mbH	
Stirn, Wilhelm F. GmbH & Co KG	Supplier of food retailing
Südlandhaus-Horst Beiderwieden GmbH & Co. KG	
Sul Portugal GmbH-Spezialitäten aus Spanien u. Portugal	
Sunda Vital oHG	
Tivona Alimentaria GmbH	
Trienon Handels GmbH	

**Table 0-22: - continued -**

Unilever Bestfoods Deutschland GmbH	
Viani Importe GmbH	Supplier of specialised shops
Vin o Ropa Weinhandels GmbH	
Vinespa Vinos Españoles GmbH	
Vinos Barron – Feines aus Spanien	
Vivolo Vin OHG	
Weinhandel Peral	
Weise von Schmeling, INKA	
Wilk GmbH & Co.	Supplier of specialised shops
Wilms Importhaus GmbH & Co. KG	Supplier of food retailing

Source: Spanish Consulate in Düsseldorf and Italian Institute of Foreign Trade (I.C.E.)