Environmental Sustainability and Olive Oil
Dialogue on best practices and practical implementation

Can sustainability create value added for olive oil sector?

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Are business and sustainability compatible?

How can sustainability become a business opportunity?

Adding value through sustainability mean finding the right balance between regulations, market opportunities, and competitiveness.

The olive olive sector is dynamic

Global olive growing extension (ha)

Area	1980	2000	2010	2020	Compound Annual Growth Rate (CAGR)
Africa	1,805.492	2.270.833	3.165.894	3.826.710	1,9%
America	30.518	70.267	179.183	192.463	4,8%
Asia	820.477	1.331.964	1.699.256	1.877.151	2,1%
Europe	2.471.814	4.677.952	4.890.225	5.148.656	1,9%
Oceania	1.000	763	41.000	20.065	8,0%
World	5.129.301	8.351.779	9.975.558	11.065.045	2,0%
Mediterranean area	**5.067.219**	**8.253.670**	**9.682.761**	**10.140.707**	**1,8%**

Source: processing and estimates based on FAO data and producing countries

traditional orchards 73%, intensive 22%, modern 5%

- ✓ In **40 years,** the olive groves have doubled (**Spain 120+%, Morocco 200+%, Turkey 80+%, Tunisia 50+%**), confirming the central role of the Mediterranean Countries in the sector.

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As production has increased, and shifted

Four-year production averages. Comparison between campaigns (tonnes)

Countries	1960/64		1990/94		2020/24	
Italy	400,5	30%	448,2	25%	293,0	10%
Spain	444,6	34%	601,6	33%	1.102,0	**37%**
Greece	137,3	10%	195,0	11%	261,1	9%
Tunisia	29,3	2%	279,8	15%	204,0	7%
Portugal	87,4	7%	34,0	2%	148,0	5%
Morocco	16,9	1%	41,0	2%	140,8	5%
Türkiye	79,5	6%	61,0	3%	273,6	9%
Others C.	129,8	10%	163,3	9%	523,3	**18%**
World	1.325,3	100%	1.823,8	100%	3.128,4	100%

There has been a shift from two leading countries, to one leader and 4 countries following; Türkiye is among them.

Source: based on ICO data

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Consumption has also shifted

Four-years consumption averages between campaigns (in tonnes)

Countries	1960/64		1990/94		2020/24	
Italy	476,4	41%	625,8	34%	434,2	14%
Spain	264,0	23%	413,8	22%	473,0	16%
Greece	131,3	11%	200,0	11%	102,2	3%
Tunisia	29,3	3%	57,6	3%	30,0	1%
Portugal	83,3	7%	45,2	2%	46,8	2%
Türkiye			52,3	3%	162,5	5%
United State	25,1	2%	96,6	5%	385,3	13%
Japan	-		5,0	0%	54,8	2%
Others C.	140,6	12%	356,8	19%	1.349,0	44%
World	1.149,9	100%	1.853,1	100%	3.037,8	100%

Source: Based on ICO data.

- ✓ consumption is expanding everywhere, especially in emerging and wealthier power countries
- ✓ Almost two third of olive oil is exported to no production areas
- ✓ Increasingly PDO/PGII, EVO, Organic, monovarietal olive oil are consumed
  - ✓ **In 60 years, olive oil has become a global product**

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The marketplace will get more crowded and will be more competitive

C_4 concentration index of production and consumption

Periods	Production	Consumption
Average Campaign 1960-64	80,7%	83,0%
Average Campaign 1990-94	83,6%	69,3%
Average Campaign 2016-20	68,9%	38,6%

Source: Base don ICO data

- ✓ The top 4 producing countries have reduced their share from 80% to 40% of world consumption in 60 years
- ✓ More olive oil is being produced in the southern hemisphere, a trend that is expected to continue and particularly for organic, high-quality, and sustainable oils

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Exploring the market for sustainable olive oils?

Sustainability will increasingly shape agricultural and trade policies and consumer choices. Whilst the pace will differ across markets, the direction is clear and irreversible.

We will look at similar products to gain insights into possible future trends.

Organic olive oil, **geographical indications**, and differentiated, high-value food products can help us understand more about consumer behaviours and how operators compete.

Organic production continues to accelerate

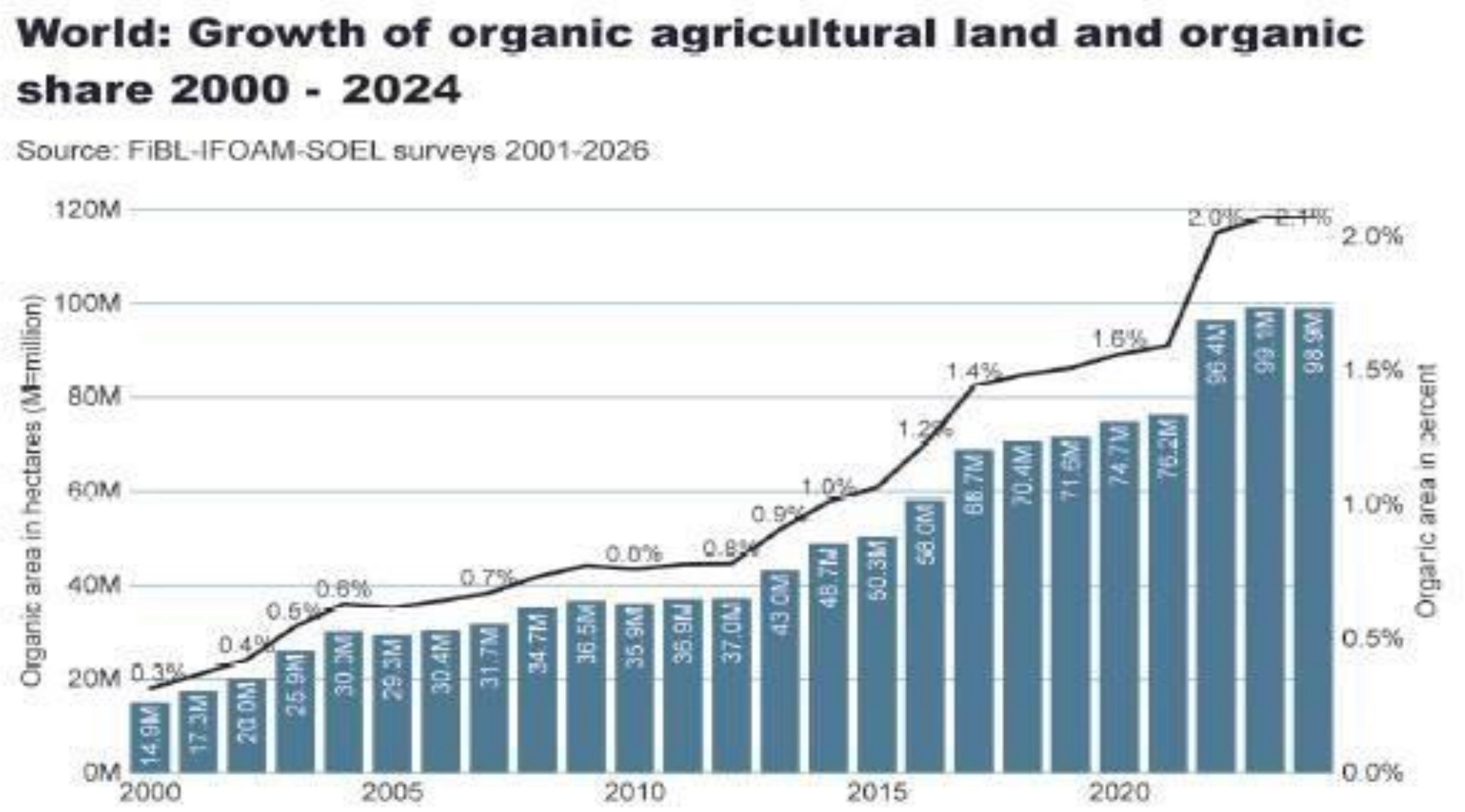
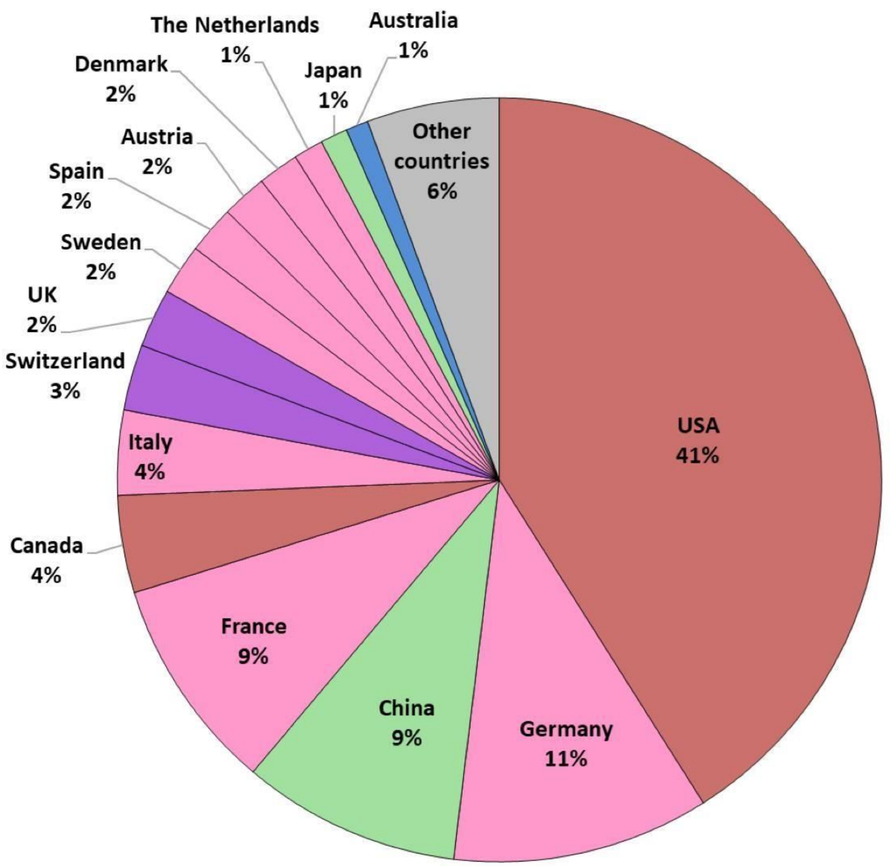


Figure 4: World: Growth of the organic agricultural land and organic share 2000-2024

Source: FiBL-IFOAM-SOEL surveys 2001-2026

From 2000, organic areas has expanded by 7 times

The organic market is now worth over 140 billion EUR/year



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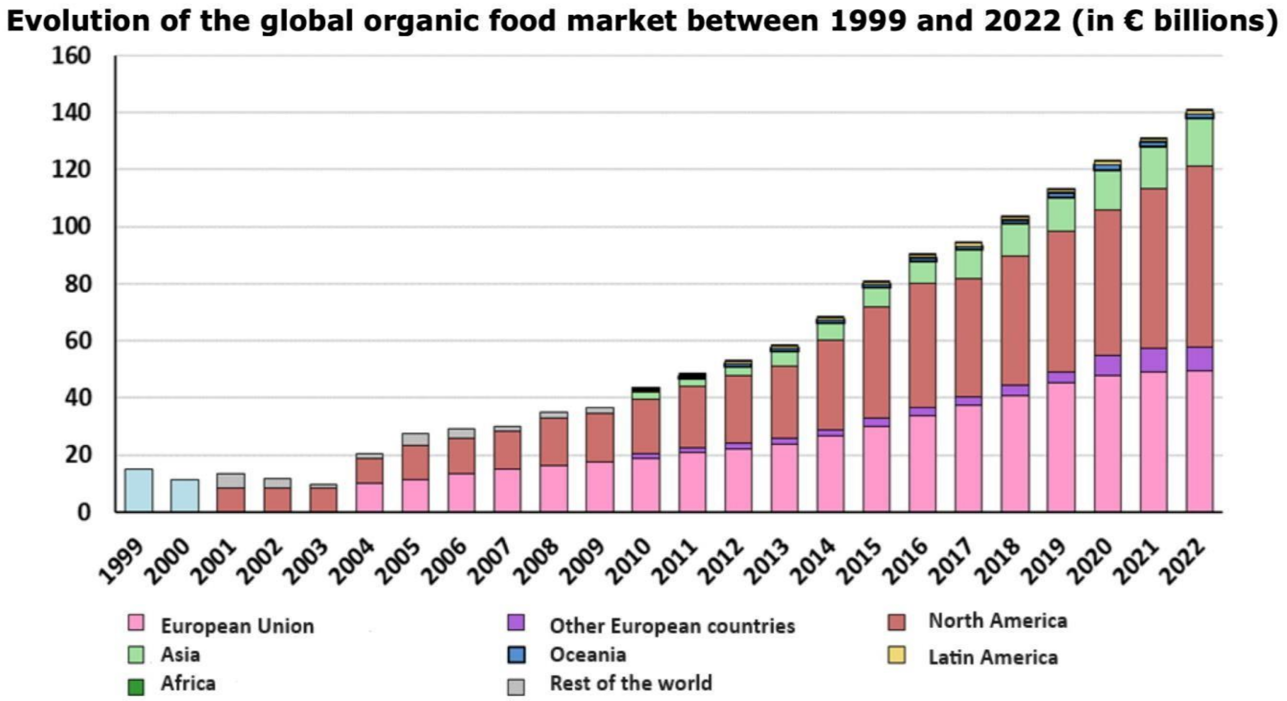

Source: Agence BIO

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Organic olive oil is well-established especially in major producers

› Olives

In 2023, almost 826’000 hectares or 7.5 percent of the global olive area was under organic management.

Olives: Organic area by country

Table 57: Olives: Organic area by country 2023

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	140	0.3	67	73
Algeria	416	0.1	416	
Argentina	9'897	7.6	9'897	
Chile	2'048	9.7	2'048	
China	1'557		636	921
Croatia	1'868	9.2	1'868	
Cyprus	1'472	13.2	1'472	
Egypt	1'103	1.0	1'103	
France	6'236	35.4	6'236	
Greece	58'840	6.5	58'840	
Iran (Islamic Republic of)	13	0.1	13	
Israel	498	1.5	492	6
Italy	215'791	18.8	215'791	
Jordan	360	0.6	360	
Lebanon	275	0.4	275	
Malta	14		14	
Mexico	365	3.8	365	
Montenegro	4	2.1	4	
Morocco	3'020	0.3	2'472	548
North Macedonia	1		1	
Palestine	4'559	8.4	4'436	123
Portugal	23'825	6.3	23'825	
Slovenia	296	20.8	246	50
South Africa	8		8	
Spain	292'868	11.2	213'837	79'031
Tunisia	153'233	8.5	153'233	
Türkiye	46'525	5.2	32'559	13'966
United States of America	666	4.8	666	
Total	**825'896**	**7.5**	**731'179**	**94'717**

Source: FiBL survey 2025, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 333
Blank cells: No data available.

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Sustainability has been added to the European GI regulation

Environmental, **economic**, or **social** sustainability aspects can now be included in GI specifications.

This enables recognition and valuation of good sustainbility practices.

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Consumers value sustainability ….

PACKAGING SUSTAINABILITY IN FOOD PURCHASING CHOICES
It is very important.

For 24% of respondents for food products in general
For 31% of respondents for healthy products
For 34% of respondents for sustainable products

HOW MUCH IS THE CONSUMER WILLING TO PAY FOR SUSTAINABLE PACKAGING?

54% of respondents confirmed their willingness to pay more (between 5% and 20%) for a €2.00 product packaged in sustainable packaging.

WHAT ARE THE SUSTAINABILITY CHARACTERISTICS MOST SEEN BY ITALIANS IN FOOD PACKAGING?

51% Complete recyclability
43% No over-packaging
40% Use of materials from renewable sources
35% Low CO_2 emissions product
32% Plastic-free

Source: Nomisma packaging observatory 2025

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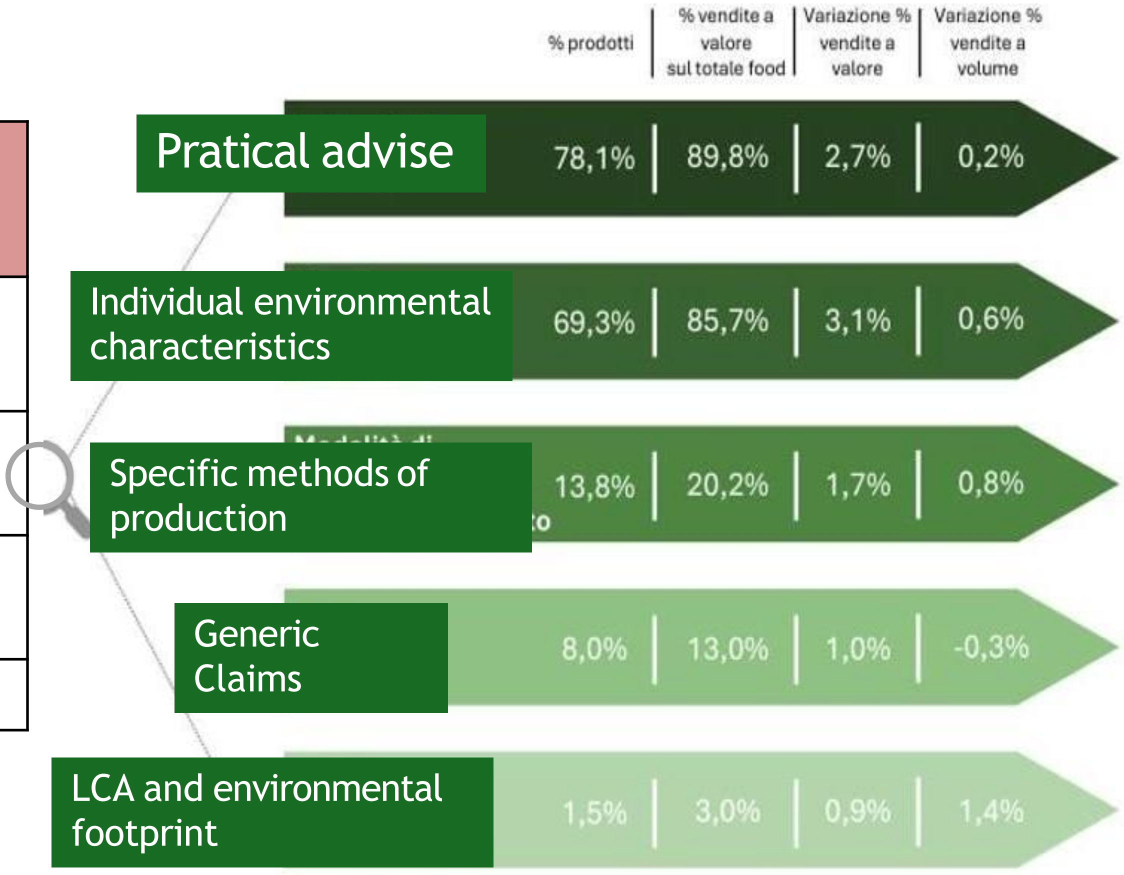
Food products sustainability claims are overwhelmingly about environmental characteristics.

Category	% of Products	% of Sales Value out of Total Food Sales	% Change in Sales Value	% Change in Sales Volume
Total Sustainable Products	84.0%	92.6%	2.4%	0.0%
Environmental Sustainability	83.8%	92.4%	2.4%	-0.0%
Social Sustainability	9.1%	13.4%	2.7%	-0.1%
Animal Welfare	2.0%	3.0%	1.6%	-0.9%



Source: Immagino Observatory'

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But are confused

GENERAL CLAIMS

- Sustainable **7%**
- Green
- Ecological
- Circularity
- Eco-friendly

PRODUCTION AND SUPPLY METHODS

- Supply Chain Regulations* **10%**
- Claims Relating to Company process
- Production Methods
- Sourcing
- from Certified Sources
- Reference to ISO:14001

INDIVIDUAL ENVIRONMENTAL CHARACTERISTICS

- Recyclability **60%**
- Ingredient Formulation **21%**
- Recycled **14%**
- Reduced Plastic
- Compostability
- Biodegradability
- Related to Circular Economy
- Single-Use Product
- Bio-Based Content
- No Plastic
- Plastic Content
- Alternative to Single-Use

LCA AND ENVIRONMENTAL FOOTPRINT

- Claims and Labels Based on Studies
- LCA and Environmental Footprint
- Certifications of Excellence
- Emissions Offsetting
- and Carbon Neutrality
- Claims on Individual Environmental
- Footprint Indicators
- Multi-criteria certifications
- on circularity

PRACTICAL GUIDELINES

- Recycling **66%**
- Use and Storage **45%**

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Sustainability is driving innovation in packaging

Glass continues to be the most widely used material for quality extra virgin olive oils

- Reduce CO_2 emissions during transportation by choosing local suppliers
- Reduce the weight of the glass to reduce transportation costs and CO_2 emissions
- Preferring raw materials that release less CO_2
- Using renewable energy for furnaces
- Reducing the kilometres needed to procure raw materials and deliver them to customers

...

- Low environmental impact labels made from recycled and recyclable paper
- Water-based inks without harmful substances and printable with reduced energy consumption
- Prints on a white background that avoid the use of bleach during recycling
- Use of agricultural waste (bioplastics) as a base for plastic substitutes
- Preference for monomaterials over composites whenever possible

Sustainability will also impact bulk trade

Bulk producers and shippers will need to prove their efforts towards sustainability.

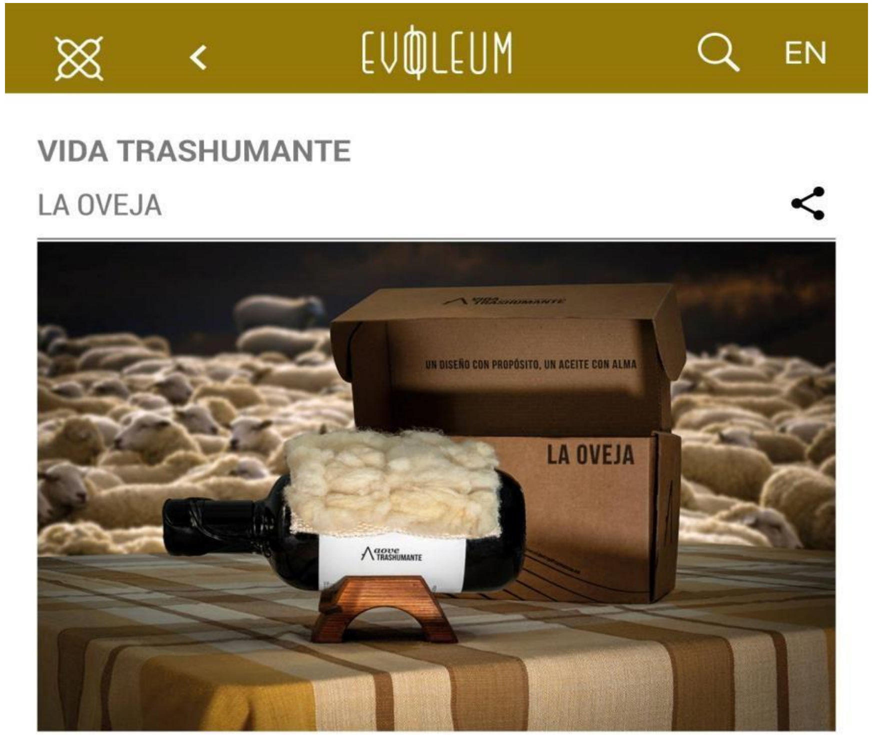
Bulk producers and shippers can – sustainability evidence to create a competitive advantage.

Olive oil packaging is becoming particularly important for creating value, and companies are rethinking it with a sustainable approach

Concorso Design | I vincitori delle Forme dell'olio 2026

condividi | martedì 13/01/2026 | 15:00 | Esperienze | Economia

Olio Officina



Label made by mineral paper free on cellulose. Rescued discharged transhumant wool, transforming it in tactile narrative skin

Label with recyclable paper affixed without glue, using natural cord. Unfiltered evo, well protected

test

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EVOLEUM EN

MOLÍ COLOMA

ARBEQUINA BAG IN BOX

Bag in box format that consume 70% less plastic than PET bottles. Cardboard 100% recyclable. Format that protect oil from oxidation. It also avoid food waste.

test

EVOLEUM EN

SUSTINERI

Oil coming from rainfed olive grove. Unfiltered blend produced without phytosanitary residue. The main label is made from recycled fibres and cereal waste. Label printed in one ink.

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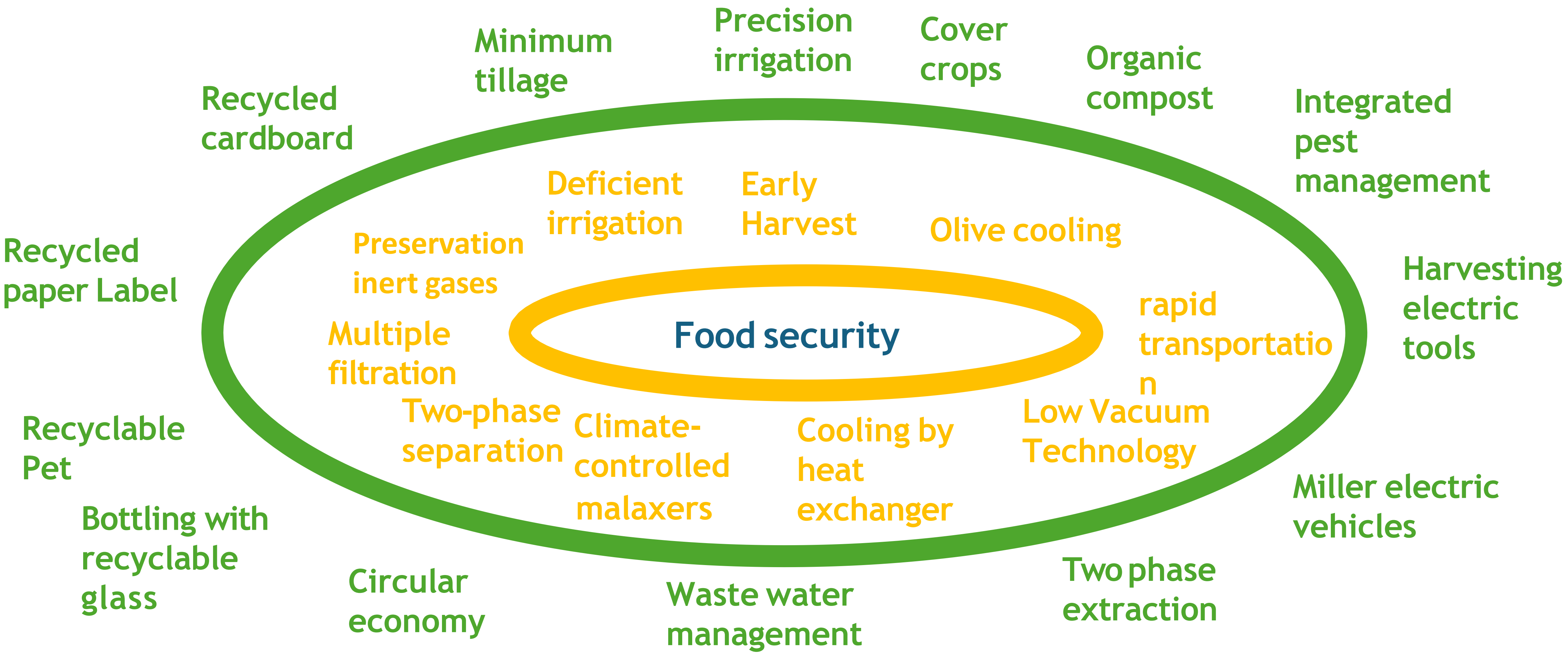
Sustainability and quality in harmony



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Communication is critical in creating value addition opportunities

Sustainability is no longer just a buzzword; it's becoming a core value across the food industry. A value to add to the high nutritional and organoleptic qualities, to make olive oil a superfood

The early bird gets the worm!

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