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Supporting Egypt's Processed Food Export Industry

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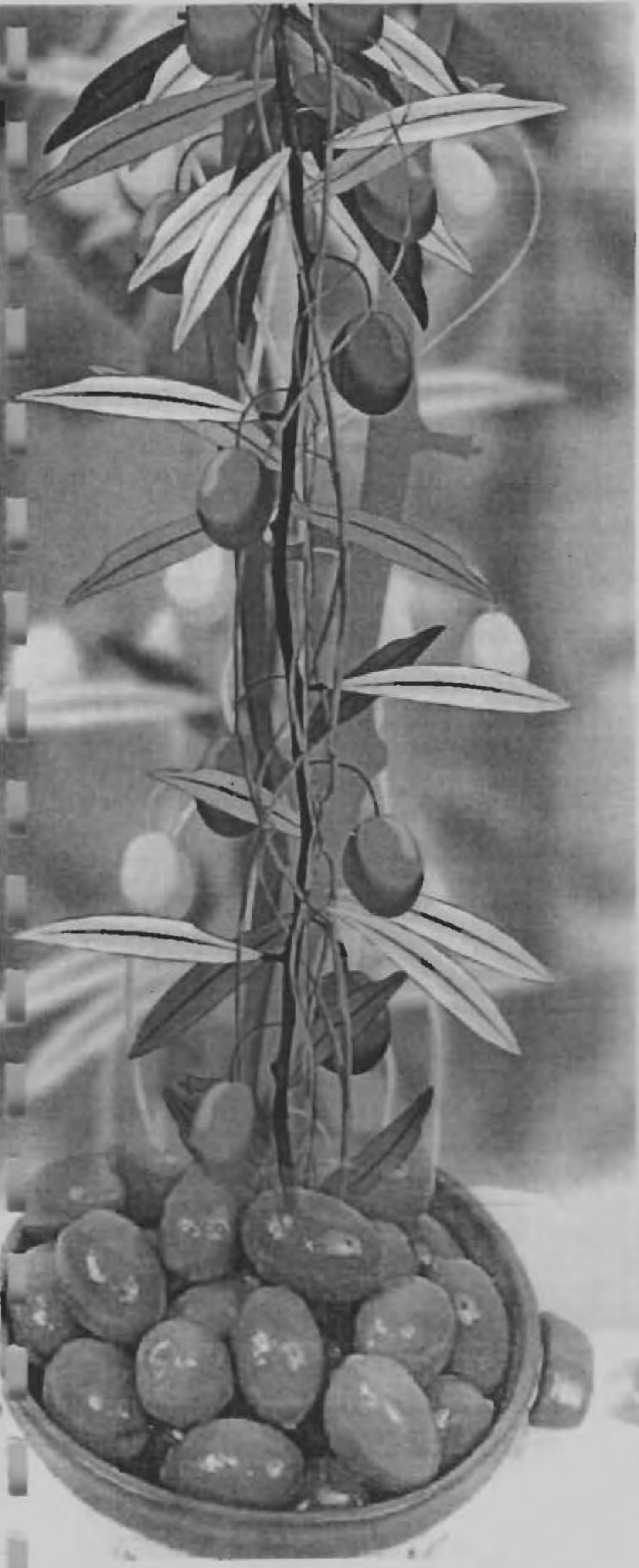

Table Olives

Situation & Outlook 2003

Douglas Anderson, MBA

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orward

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Welcome to the new ALEB marketing publications format. Compared to the previous MarketPulse/Egypt you might find this new format more easy to use and more decision-making oriented. Our new concept is to develop series of cluster (group of related commodities) focused publications which we belief will be very useful in the long run business and marketing planning in your company.

A. Anderson, MBA

Our goal from this series of publications, as well as other MIS activities, is to help your staff to understand global market trends for your products and utilize this comprehensive information and knowledge in your decision making process.

A. El - Saied, Ph.D

For the short term planning processes ALEB BDS/MIS intends to publish a monthly review of world market for your products on our Web site (www.aleb.org) These updates will be based not only on statistical trade data that we subscribe to and market information on the Internet, but also on own sources such as wholesale prices which are gathered continuously from target markets by a team assigned by ALEB to perform this task.

Suggestions and recommendations are highly appreciated.

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World Production of Raw Olives

World production of raw olives in 2000 reached a record level of more than 16 million tonnes. This record harvest was mainly the result of favourable weather in olive producing countries, particularly Spain. In 2002 production fell by 12.3 percent compared to 2000; however it was still well above the 1995-1999 average.

Figure 1 World Raw Olive Production, 1980 - 2002

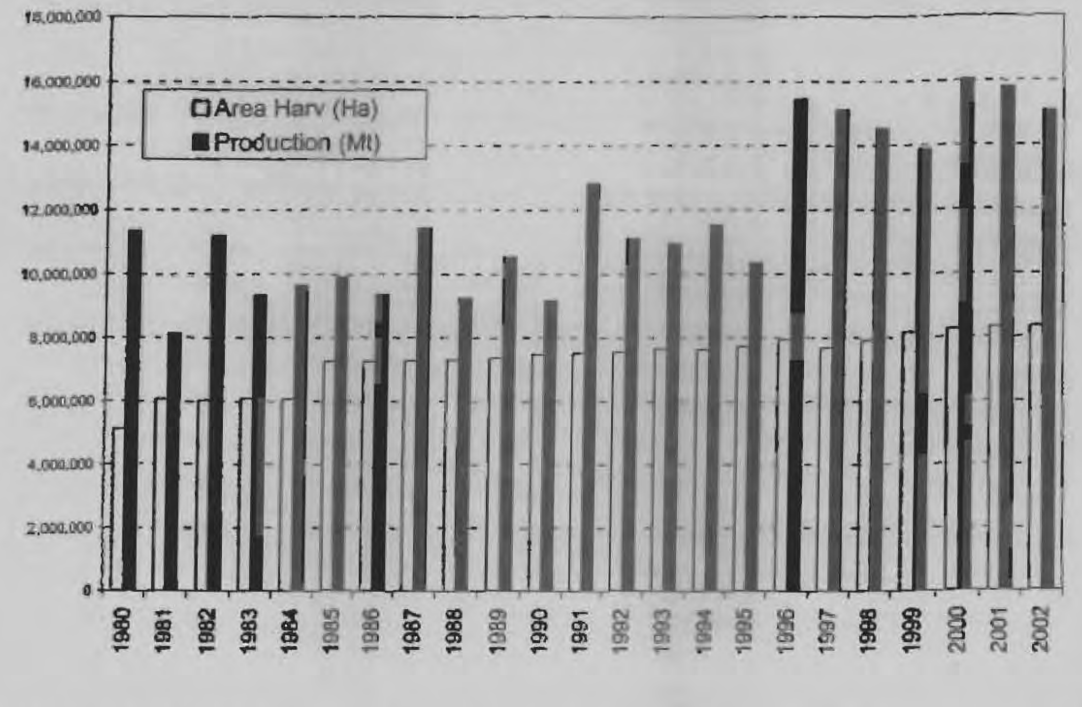
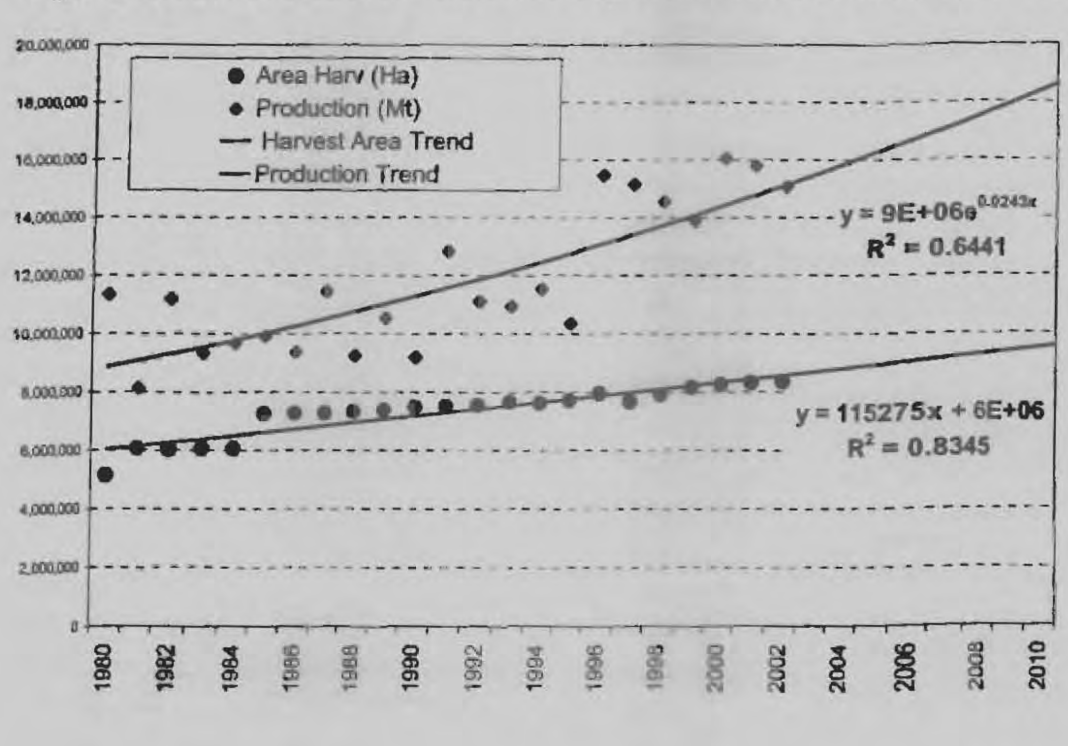


Figure 2 World Raw Olive Production Expected Growth Trend, 1980 - 2010



According to this data it is expected for the olive harvested area to reach a record of 9 million hectares by 2010 while production volume is expected to record a level of 19 million tons.

Spain and Italy are by far the major olive producing countries, with 30.8 percent and 19.6 percent respectively of total world production in 2002. Greece (14.3%), Turkey (10.8%) and Syrian Arab Republic (7.1%), Morocco (3%), Portugal (2.3%), and Egypt (2.3%) are also major producers. In terms of area harvested, Spain held first place in 2002 with 27.5 percent of the total.

Figure 3 Top 10 World Raw Olives Producers in 2002

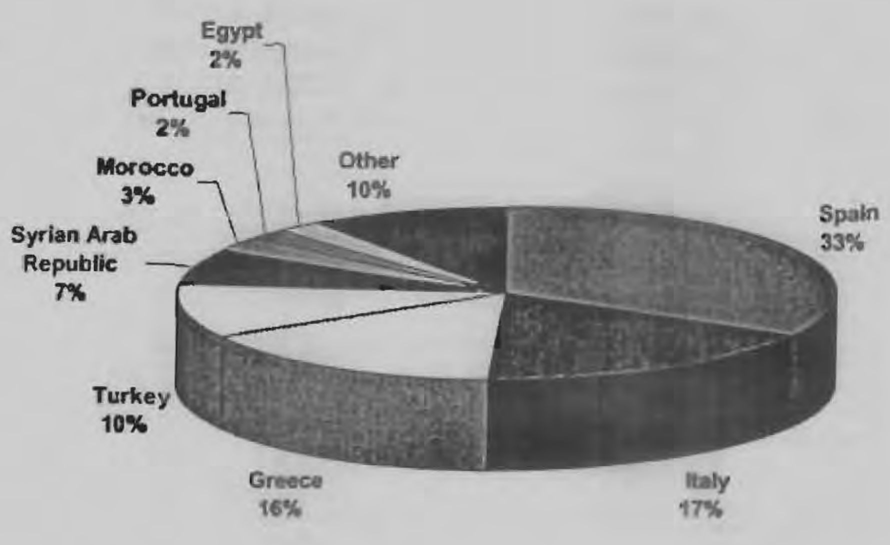
World Raw Olives Production 2002

	Area Harv (Ha)	Production (Mt)	Area %	Production %	Mt/Ha
World	8,354,606	13,976,487	100.00	100.00	1.67
Spain	2,300,000	4,303,700	27.53	30.79	1.87
Italy	1,145,000	2,732,000	13.71	19.55	2.39
Greece	765,000	2,000,000	9.16	14.31	2.61
Turkey	570,000	1,500,000	6.82	10.73	2.63
Syrian Arab Republic	498,981	998,988	5.97	7.15	2.00
Morocco	550,000	420,000	6.58	3.01	0.76
Portugal	450,000	320,000	5.39	2.29	0.71
Egypt	49,888	318,339	0.60	2.28	6.38
Algeria	178,000	200,000	2.13	1.43	1.12
Jordan	64,484	180,900	0.77	1.29	2.81
			78.66	92.83	

According to the IOOC there are 789 million trees worldwide, 95 percent of them in the Mediterranean region (Mesa). European estimates in 1998 indicate that there were 460 million productive trees in the European Union and around 2 million farms engaged mainly in olive growing (EU). Spain had more than 167 million trees planted in 1990.

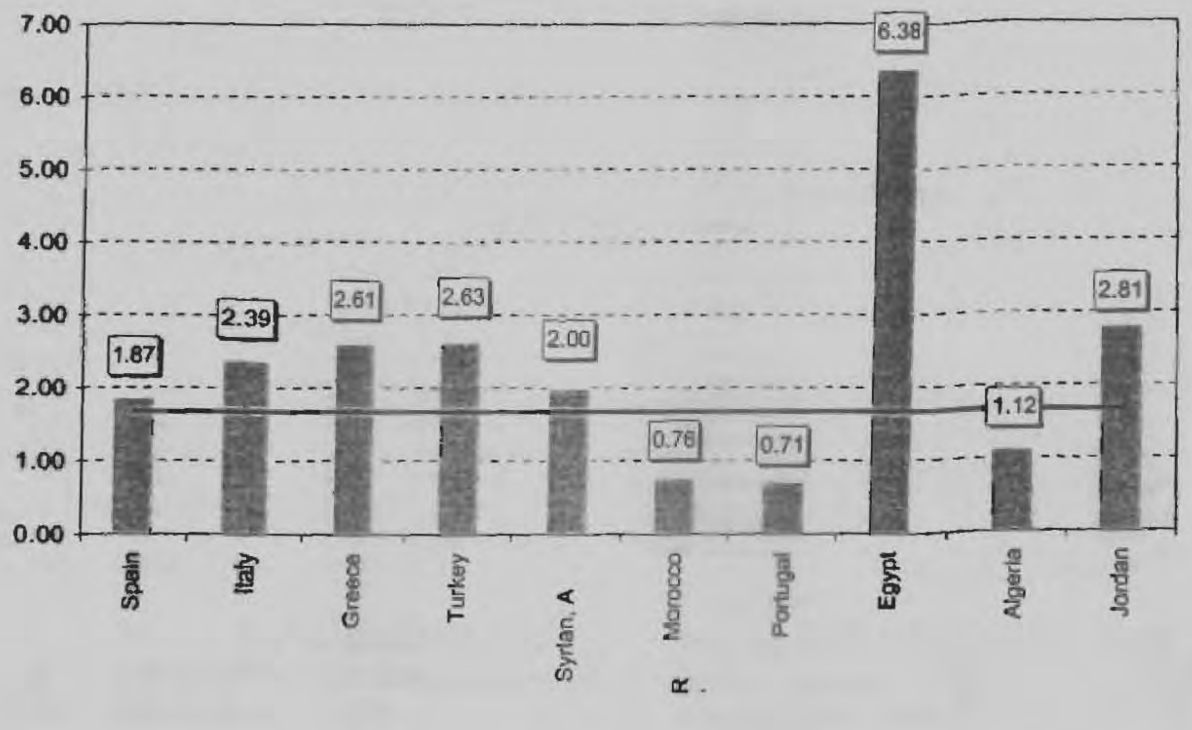
The European Commission recently expressed concern at the record levels of olive production. According to the Commission 'when new trees come into production (which can take three or four years), there is the serious risk that European production would outstrip demand at home and abroad' (Smith; EC).

Figure 4 Percentage of olive producing trees by country



Productivity varied significantly among major producers in 2002 as represented in the following graph. Egypt by far enjoys very high productivity compared to other producers. This might be attributed to the alternate bearing nature of olive trees.

Figure 5 Olive Average productivity in 2002 (Mt/Ha)



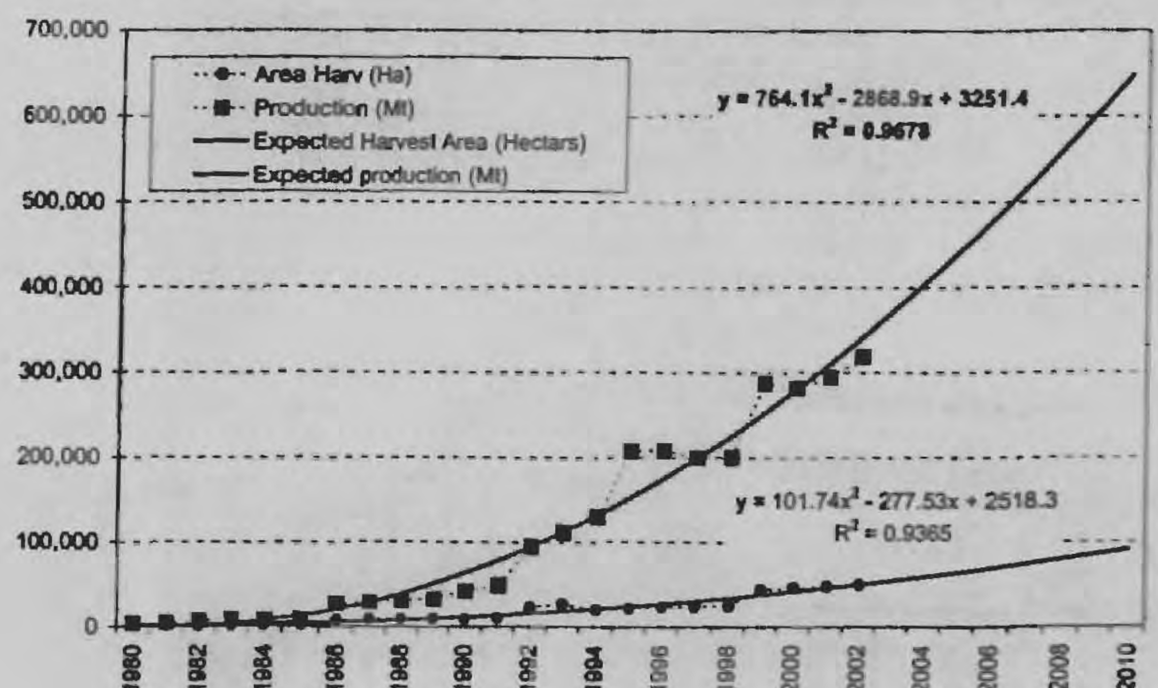
Egypt Olive Production and Trends

Egypt is ranked number 8 in the top olive producer's world wide with a record of 318 thousand metric ton in 2002. Area harvested and production showed very rapid increases in the last five years and is expected to increase significantly within the next few years. New olive cultivation in the new land areas is expected to position Egypt as the third most important producing country of olives by the year 2010.

Harvested area is expected to record a level of 100 thousand hectares and production volume is expected to reach more than 800 thousand metric ton by the year 2010 as indicated the following graph. These expectations are supported by the following factors:

- Expected increase of land devoted for olive production in the new Meja projects in Toshka and Owienat.
- Tendency of producers to grow new superior varieties with high yield

Figure 6 Egypt Olive Production and Expectations



Egypt has one of the highest olive yields in the region – about 6.38 Mt/ha (Figure 5.). The main olive-producing areas are in the northwest coastal region between Alexandria and Salum; the most popular variety is Chemlal, but some Kalamata, Hamid and Mission are also produced. Growers have introduced superior varieties such as Manzanilla in recent years.

Olive yields per tree vary between 10 kg and 35 kg, depending on the system of irrigation used. Some areas in the Martrouh region reach 50 kg to 60 kg per tree (15-year-old trees under irrigation). In 2002 Egypt had 9.2 million trees, most of them producing table olives for local consumption.

Egypt olive industry is oriented towards the production of table olives, mainly for the local market. On occasions, Egypt has also had to import olives to meet its requirements. Most of its olive product trade is in preserved olives, with Spain the main export market and France and Germany minor destinations.

The government has taken measures to improve olive cultivation. Among such measures are the new orchards being planted under the General Organization for the Development of the Desert programs. It is estimated that there are 8.4 million trees not yet of bearing age, and a further planting of around 1.4 million trees is planned in the near future.

The processing of olives still uses traditional methods and equipment. However, there is a trend towards modernisation of the processing sector and the construction of more modern facilities.

Figure 7 Olives Major Producing Areas in Egypt

World Markets and Export Opportunities for Table Olives

World Table Olive Market

The market for table olives during the last few years exhibited significant increase in both production and consumption. Production reached 1,082,500 tonnes, 20 percent above the average for the period 1992-2002 to 1990-91. World consumption has risen 20 percent above the 1990s average. Production of table olives in 2002 exceeded consumption. However, according to the IOOC this is not likely to continue as the increase in consumption of the past six years is expected to continue.

In the 1990 – 2002 crop year, world production of table olives was dominated by Spain (23.7%). Other significant producers were Turkey (18%), the United States (13.3%) and Morocco (9.7%). The major consuming countries were the United States and Turkey each 15%, Italy (11%) and Spain (10%).

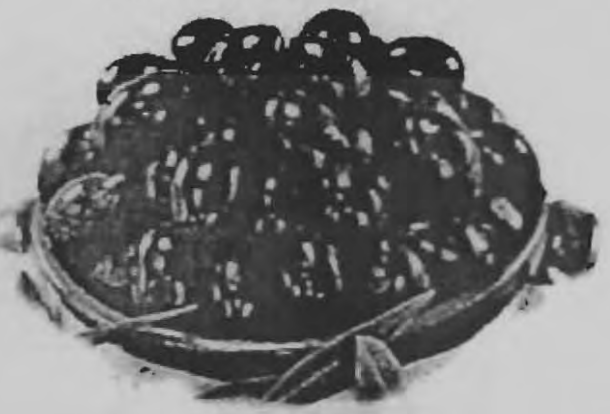
Traditionally, green olives are the main type of table olive produced worldwide, followed by black olives and olives turning color. Although world production of table olives was expected to fall during the 2001/2002 crop year, production of green olives was forecast to increase by 2.5 percent. Consumption of olives turning color was expected to remain constant in 2001/2002, while consumption of black olives and green olives was expected to rise by 10.2 percent and 1.7 percent respectively, compared with the previous levels.

Figure 8 Green Olives

Figure 9 Black Olives

Figure 10 Blond Olives

Figure 11 Calamata Olives



A closer examination of the production figures indicates that world production of green olives is dominated by Spain (39%), Syria (12%) and Morocco (10%). Turkey (43%), Morocco (12%), Greece (10%) and Italy (10%) dominate production of black olives. The main producers of olives turning color are the United States (56%) and Spain (25%).

Figure 12 Table Olive Production by Country

Figure 13 Table Olive Consumption by Country

* Producing/consuming less than 15 000 tonnes

Figure 14 Production of Table Olives by Type

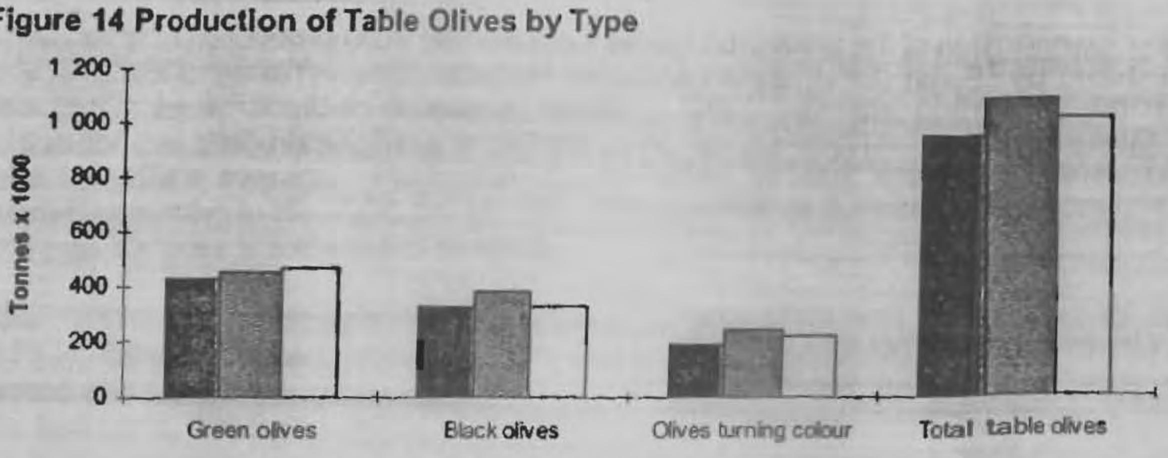
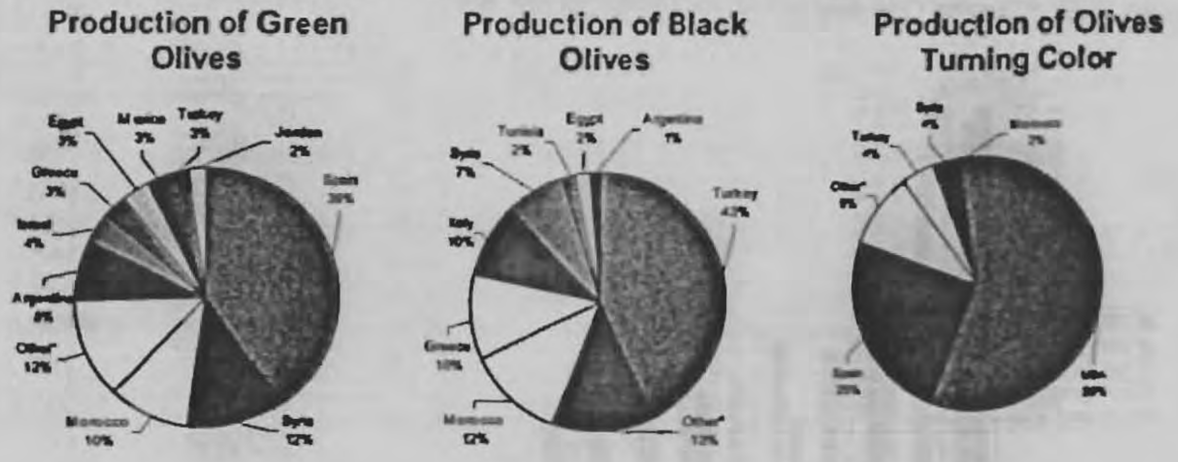


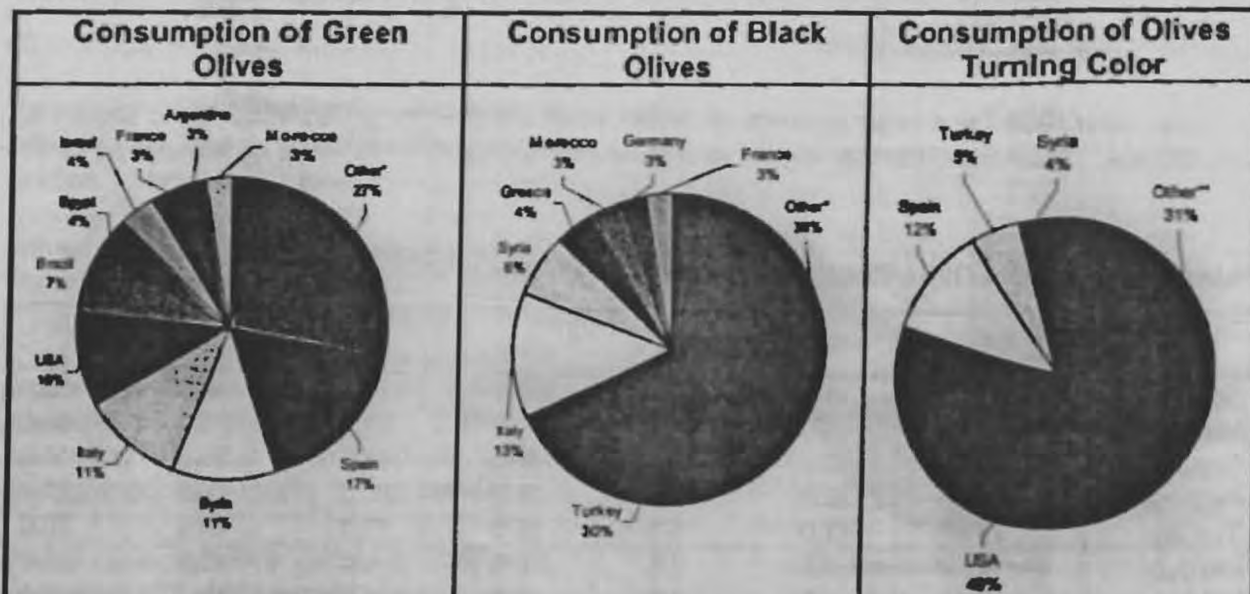
Figure 15 Production of green, black, and turning color olives by country



** Producing less than 10 000 tonnes*

Spain (17%) heads world consumption of green table olives followed by Syria (11%), Italy (11%) and the U.S. (10%). Turkey (30%) dominates consumption of black olives, with Italy (13%) and Syria (6%) also significant users. The main consumers of olives turning color are the U.S. (48%) and Spain (12%).

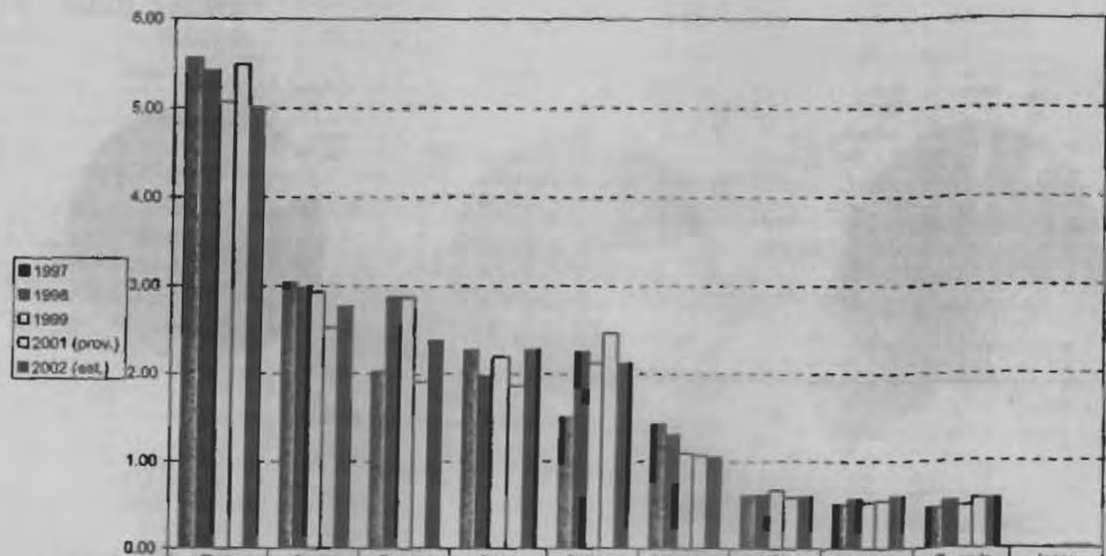
Figure 16 Consumption of green, black, and turning color olives by country



Consuming less than 10 000 tonnes ; *consuming 5 000 tonnes or less*

On a per capita basis Syria dominates world consumption of table olives, followed by Spain, Greece, Italy and Turkey. The United States, Australia and Canada have recorded modest increases in per capita consumption.

Figure 17 Per Capita Consumption of Table Olives (kg)



	Syria	Spain	Greece	Italy	Turkey	Morocco	USA	Australia	Canada	Japan
1997	5.56	3.04	2.03	2.27	1.51	1.43	0.61	0.51	0.47	0.00
1998	5.42	2.98	2.88	1.98	2.25	1.31	0.62	0.57	0.55	0.00
1999	5.07	2.93	2.87	2.19	2.12	1.09	0.67	0.53	0.49	0.01
2001 (prov.)	5.49	2.52	1.91	1.87	2.46	1.07	0.59	0.55	0.57	0.02
2002 (est.)	5.02	2.77	2.38	2.27	2.12	1.06	0.60	0.60	0.57	0.02

World Trade in Table Olives

For the 2001/2002 crop year, exports of table olives were expected to total more than 480, 000 tonnes. Spain is by far the largest exporting country (39%), followed by Morocco (19%).

Table 1 Main Table Olive Exporting Countries (tonnes x 1000)

Country	95/96	96/97	97/98	98/99	99/00	00/01 (prov.)	01/2002 (est.)
Spain	134.5	136.9	113.8	107.8	119.3	130.0	135.0
Morocco	50.0	45.0	50.0	71.0	60.0	68.0	65.0
Greece	35.0	35.0	30.0	40.0	55.0	50.0	45.0
Argentina	20.0	25.0	25.0	28.0	20.0	24.0	20.0
Turkey	12.0	13.0	15.0	29.0	22.0	26.0	25.0
Mexico	14.0	6.5	6.5	0.5	5.0	5.0	5.0
USA	3.0	1.0	9.0	10.0	4.0	10.0	6.0
Others	11.7	17.4	20.7	22.4	37.8	28.9	36.7
Total	280.2	279.8	270.0	308.7	322.8	341.9	337.7

The main importing countries are the United States (25%) and Italy (14%).

Table 2 Main Table Olive Importing Countries (tonnes x 1000)

Country	95/96	96/97	97/98	98/99	99/00	00/01 (prov.)	01/2002 (est.)
USA	76.0	75.0	71.0	69.0	72.5	77.0	86.5
Italy	51.7	76.3	49.2	48.0	47.5	57.0	50.0
Brazil	20.0	21.0	30.0	32.0	25.0	35.0	35.0
France	35.4	26.5	25.1	31.9	30.5	28.0	28.0
Germany	16.5	16.5	17.0	18.7	23.5	23.3	24.0
Canada	10.5	13.0	13.5	16.0	14.5	17.0	17.0
Australia	6.0	6.5	7.0	8.0	7.5	8.0	9.0
Others	67.4	36.6	75.2	86.4	101.2	104.7	100.8
Total	283.5	271.4	288.0	310.0	322.2	350.0	350.3

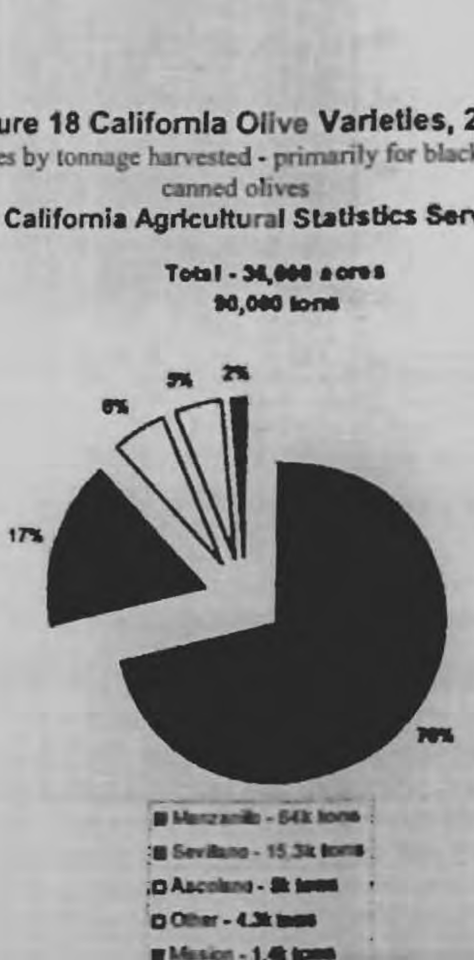
United States is the Most Important Market for Table Olives

Market Brief: Production and Consumption

More than ninety-nine percent (99%) of the table olives grown in the United States are produced in California. There were one thousand two hundred twenty-five (1225) California olive growers in 1997. Over two thirds of these growers have less than two acres. Only five growers have more than five hundred acres. The value of California olives produced in 1997 reached $66.8 million - less than twenty-five percent (25%) of the domestic demand for olives. In the face of increasing demand for table olives in the United States, California olive producers' market share continues to decline. These producers have carved a high premium niche for themselves, selling their California olives to the high-end markets under recognized, high value brand names.

Major olive varieties grown in California indicated in the following graph

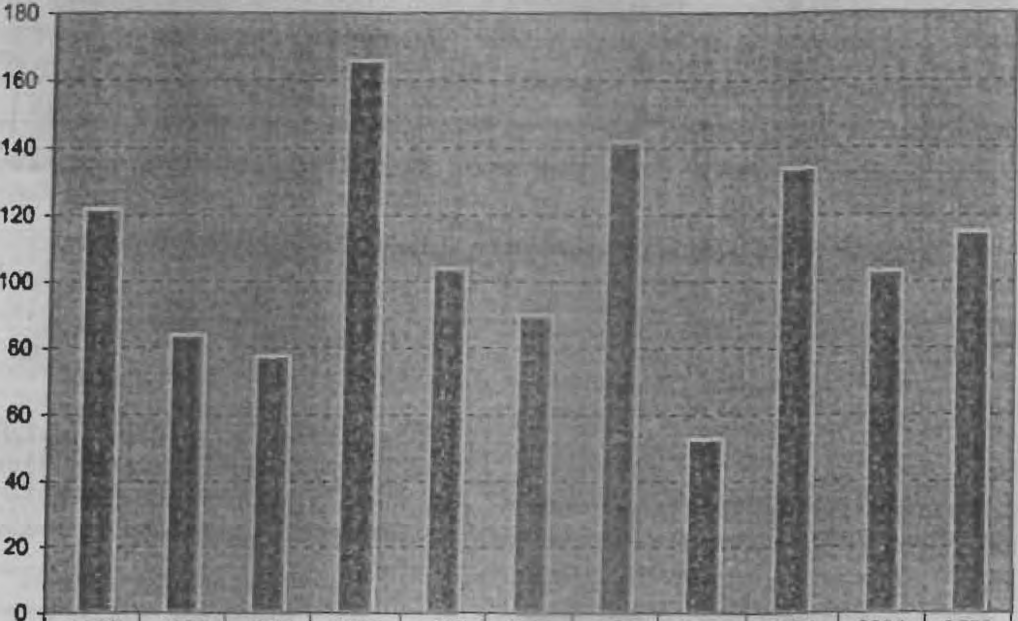
Figure 18 California Olive Varieties, 2002
Olives by tonnage harvested - primarily for black ripe canned olives
per California Agricultural Statistics Service



California's 2003 olive crop forecast is 115,000 tons, up 12 percent compared to last year's 103,000 tons. The bearing acreage remains at 36,000 acres. The yield, at 3.19 tons per acre, is 12 percent more than the previous year. The olive crop is alternate bearing, with this year representing the high year of production. Production, however, is expected to be lower than originally anticipated. The cool, wet spring delayed bloom in most locations. Temperatures then increased, resulting in an uneven bloom and spotty set.

The Manzanillo and Sevillano varieties are expected to produce 74 percent and 13 percent, respectively, of the total production. The remaining 13 percent are expected to come from all other varieties. The majority of the total production will be utilized for canning. It is estimated that approximately 105,000 tons will be canned with the remaining 10,000 used for olive oil and other specialty products according to a survey done by California Agricultural Statistics Service (CASS).[1]

Figure 19 California Olive Production 1993-2002, 2003



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Thousand Tons	122	84	77.5	166	104	90	142	53	134	103	115

[1] **SURVEY METHODOLOGY:** The California Agricultural Statistics Service (CASS) designed the probability survey, developed a sampling scheme, and analyzed the data. The olive industry provided CASS with grower names and last year's tonnage.

SURVEY SAMPLE A total of 339 growers was sampled for the survey. Reports from 314 were used by CASS to establish this forecast. The sample is designed to give a State estimate of all varieties; estimates by variety should be construed to be less precise.

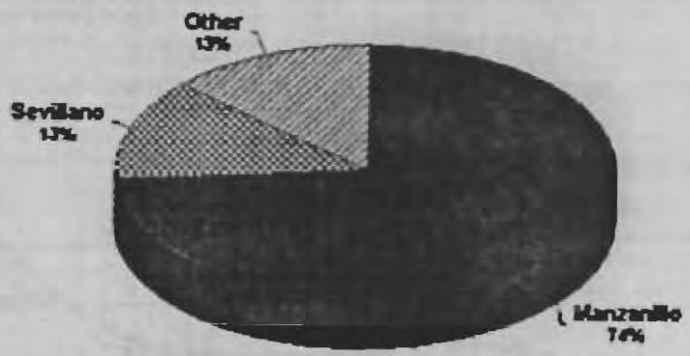
VARIETAL FORECAST Growers were asked to estimate production by variety. The following table lists a varietal level forecast based on survey data.

Table 3 California olive production by variety

Variety	2002		2003 Estimated Tonnage	Percent Change
	Acreage	Tonnage		
Manzanillo	26,000	66,300	85,000	128
Sevillano	6,500	23,500	15,000	64
Other 1/	3,500	11,500	15,000	130
TOTAL	36,000	103,000	115,000	112

1/Includes acreage and production for varieties that were or will be used for oil and other specialty products.

Figure 20 California Olive Production Percent by Variety



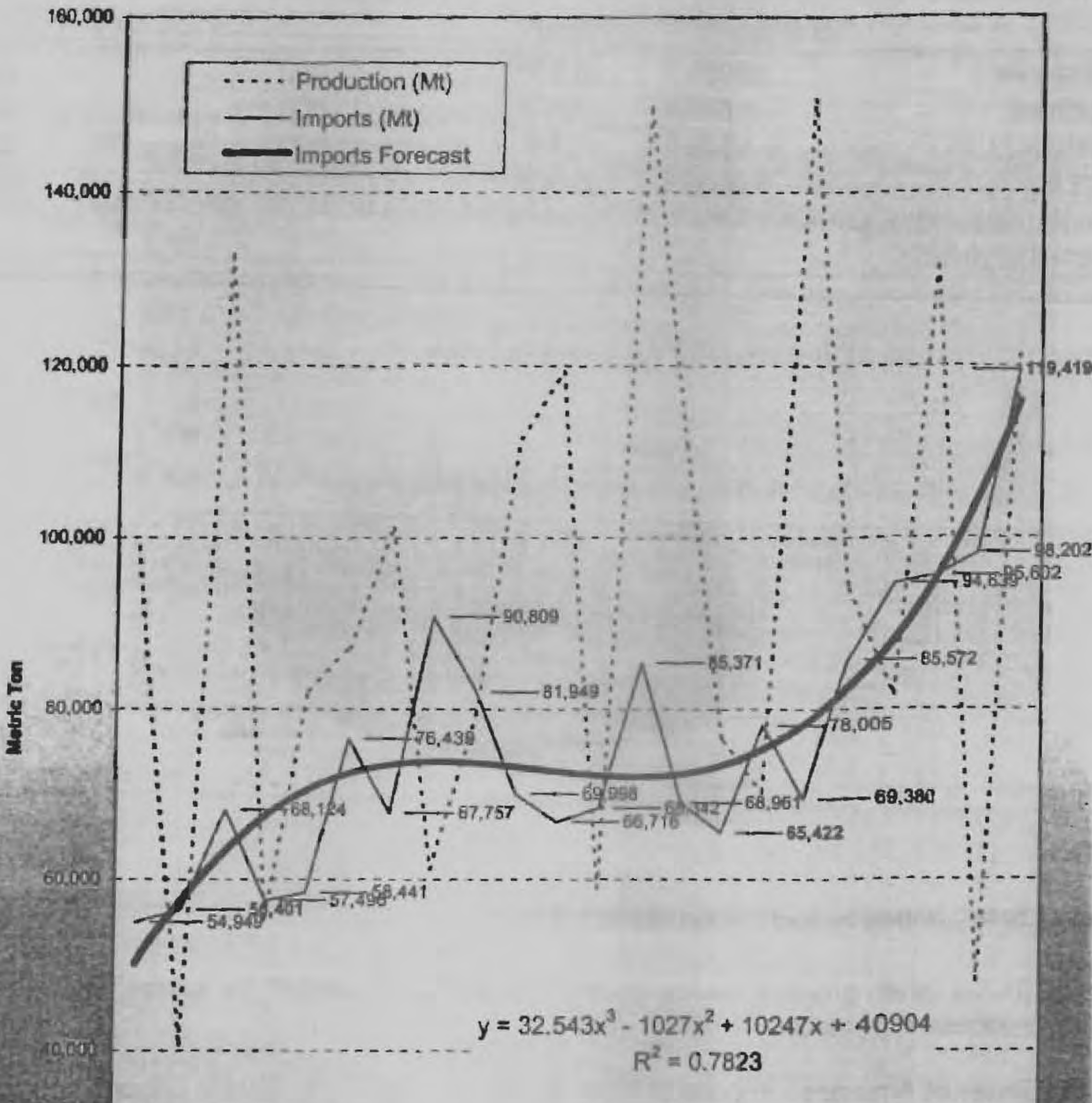
Market Brief: Imports and Import Market Size

United States olive growers cannot supply the domestic demand for olives, which opens doors for increasing imports.

United States of America's imports of table olives represent 36% of world imports, its ranking in world imports is 1 with Spain the major supplier. The Spanish table olive exports into the USA market in 2001 amounted to US$ 157,000 million (102 thousand tonnes) representing almost 72% of total USA imports of this product. The second largest two exporting countries are by far Greece and Morocco with market shares of 14percent and 9 percent respectively. Total USA table olive import market according to Comtrade is estimated at US$ 220.8 million as detailed in the following tables.

Regardless of the severe fluctuations in olive production in the United States from year to year, local production is limited and the share of olive imports are increasing over time. Strong demand with fluctuating and limited local olive supplies offers excellent opportunity for serious suppliers. Spain, Italy, and Turkey dominate the market, however Egypt, with careful supply planning, will be able to compete effectively in the market.

Figure 21 Production, Consumption, and Imports of Table Olives into the United States Market and Projections



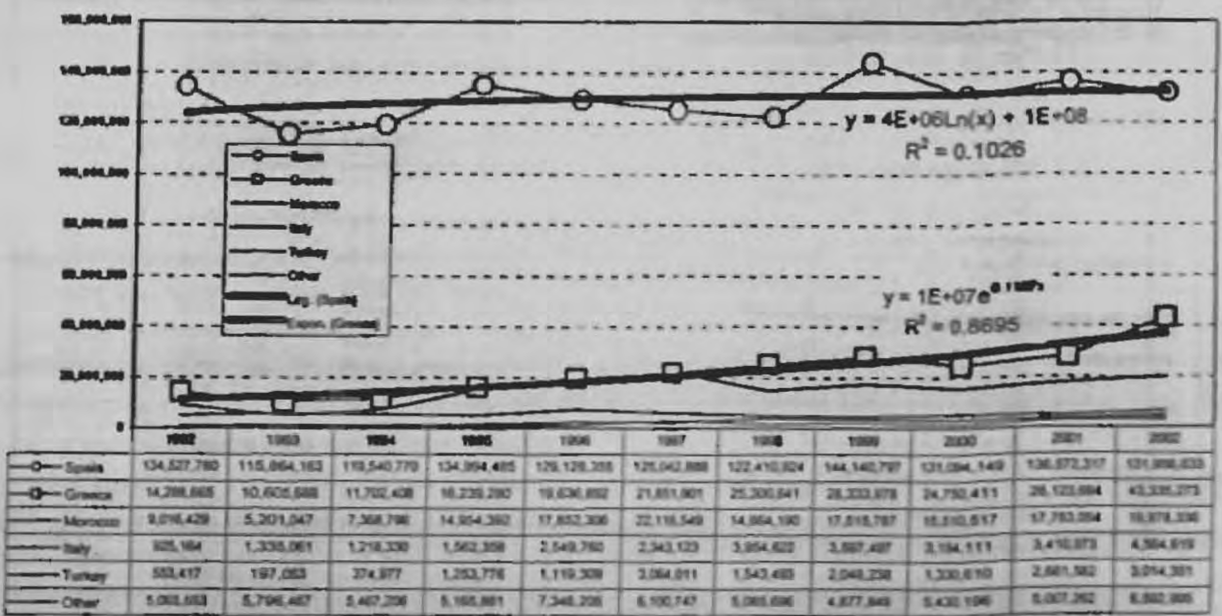
Total U.S. imports of olives reached a level of \$224.3 million (CIF value) in 2002, up 12 percent over the 2001 level of \$200.1 million. This increase was due to higher average CIF import values and a slight increase in the total quantity imported during CY 2002, compared to year earlier levels. Total quantities of olives imported into the U.S. market have increased 20 percent over the last five years to 94,245 MT in CY 2002.

Total U.S. imports of preserved olives reached a level of $209.4 million (CIF value) in 2002, up 8 percent over the 2001 level of $193.5 million as shown in the following table:

Table 4 US Table Olive Imports: Major Suppliers, 1995-2002 (in US$)

	1996	1997	1998	1999	2000	2001	2002
Total	177,632,827	180,519,219	173,159,566	200,514,146	181,269,994	193,558,872	209,442,207
Spain	129,128,355	125,042,888	122,410,924	144,140,797	131,094,149	136,572,317	131,956,633
Greece	19,636,892	21,851,901	25,300,641	28,333,978	24,750,411	28,123,684	43,335,273
Morocco	17,852,306	22,116,549	14,864,190	17,515,787	15,510,517	17,783,054	19,978,336
Italy	2,549,760	2,343,123	3,954,622	3,597,497	3,154,111	3,410,973	4,564,619
Turkey	1,119,309	3,064,011	1,543,493	2,048,238	1,330,610	2,661,582	3,014,351
Other	7,346,205	6,100,747	5,085,696	4,877,849	5,430,196	5,007,262	6,592,995

Figure 22 US Table Olive Imports: Major Suppliers and Trends, 1992-2002



Spain is the dominant supplier of olives to the U.S. market, exporting $132 million (CIF value) and representing 63 percent market share of total U.S. imports of olives. Greece was the second largest supplier of olives to the U.S. market, with trade valued on a CIF value basis at $43.3 million during 2002. This represented a CIF market share in CY 2002 of 20.6 percent.

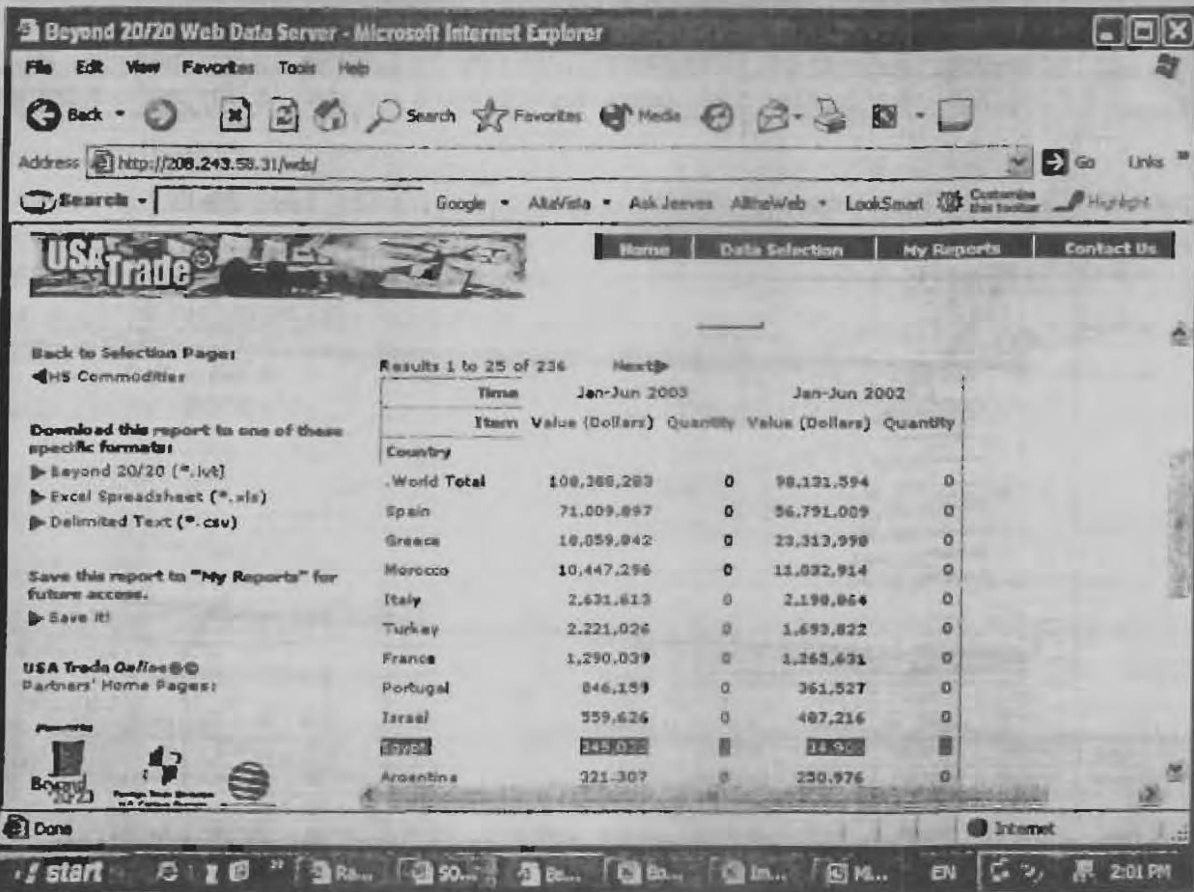
Morocco was the third leading exporter of olives to the U.S. market during CY 2002. In that year, the U.S. imported $20 million (CIF value) in olives from Morocco. During CY 2002, Morocco's CIF value market share of the total U.S. olive import market was 9.55 percent.

These top three supplying countries therefore supplied 93.2 percent of total U.S. imports of all olive products, on a CIF value basis. The volume of their CY 2002 exports of olive products to the U.S. market totalled 84,065 MT, which accounted for over 89 percent of the total tonnage imported last year.

Egypt has shipped only very limited quantities of olives to the U.S. market over the five-year period covering calendar years 1998 through 2002. The largest shipments occurred in CY 1996, when 17 MT were exported at a CIF value of $37,000. Shipments amounting to only a few thousand dollars took place in calendar years 1995, 1997 and 1999.

With extensive ALEB assistance, Egypt table olive exports into the US market showed very rapid growth during the first half of 2003 (100 times more compared to the same period of the previous year and 8 times more than all Egyptian table olive exports to the US market during the last 10 years. By this, Egypt jumped to be the 9th supplier and overcome many traditional suppliers such as Argentina, Syria, and Jordan.

Figure 23 Egypt Exports of Table Olives into the US Market Booming in the First Half of CY2003



It is clear that Egypt has the capacity to produce olives in sufficient quantities to gain increase entry in the US market. Only a 1% market share of the US imports represents a 943MT export potential, but represents less than one half of 1% of Egyptian production. At an average price of $1.75/kg, a 1% market share would represent olive export sales from Egypt in excess of $1,650,000.

One area where Egypt is faring well is with pitted green olives sold to Spain at an average price of $0.93 kg. But these same olives are sold by Spain, depending on HTS code, to the United States at $2.20 kg (see table 6).

Based on this preliminary analysis of the U.S. import trade in olives, Egyptian olive exporters will have to aggressively market their products on the U.S. market, and will most probably need to offer delivered export price levels that are highly competitive with those from Spain, Greece, and Morocco. Since Egypt is starting to be a player on the U.S. market for olives, exporters will most likely need to be in a position to offer landed export prices at levels below those of their competitor companies in Spain, Greece and Morocco in order to buy market share and develop significant new long-term export business.

Then they must be prepared to back up their pricing with desirable packaging and customer relations. Getting the olives to market at a competitive price, in a master container that does not fall apart, in a package the consumer wants and with vigorous follow-up and after sales service should be a winning combination to sustainable olive sales to the United States of America.

Types of olives in demand

U.S. imports of olive products are classified under the U.S. Harmonized Tariff Schedule into thirty-four different categories, of which the leading twenty-eight are shown in the following table:

Table 5 Ranked US Imports of Table Olive by Type

Time / Item	2002 Value (Dollars)	2002 Quantity	Rank by Value 2002
HS Commodity			
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	209,442,207	0	
2005702550 Olive Green Whole Stuffd Cntr Less Than 8Kg Saline (Kg)	65,671,985	27,621,479	1
2005706050 Olives Not Green, Sliced Canned in Saline Solution (Kg)	40,610,840	28,143,978	2
2005707500 Olives Not Green, Not Canned, in Saline, Nesoi (Kg)	29,071,506	12,364,073	3
2005709700 Other Vege, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	13,734,054	3,746,328	4
2005702560 Olive Green Broken/Slicd/Salad Less Than 8Kg Salin (Kg)	12,602,159	7,330,607	5
2005701200 Olive, Green, Not Pitted, in Saline, Nesoi, Nt Frz (Kg)	8,707,936	3,693,893	6
2005702520 Olive Green Whole Stuffed Ctr Over 8 Kg, in Saline (Kg)	8,032,617	6,005,922	7
2005706020 Olives Nt Green Whole Pitted Canned Ov .3Kg Saline (Kg)	4,746,239	3,092,431	8
2005701600 Olives Grn Stffd Packed Saline Not Gt 2700T/Yr (Kg)	4,323,314	847,504	9
2005702510 Olives, Green, Whole, Pitted, Cntr Ov 8 Kg, Saline (Kg)	4,124,744	1,724,237	10
2005706070 Olives Nt Green, Wedged or Broken Canned in Saline (Kg)	3,387,235	2,251,785	11
2005702540 Olive Green Whole Pttd Cntr Less Than 8 Kg Saline (Kg)	3,163,646	1,373,270	12
2005706030 Olive Nt Green Whole Pitted Canned Lt .3 Kg Saline (Kg)	2,256,366	1,342,802	13
2005702530 Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	1,855,561	2,394,088	14
2005707000 Olive Nt Green Nt Canned, Glass/ Metal Airtite Ctr (Kg)	1,752,342	510,942	15
2005705030 Olive Nt Green Nt Pittd, Canned Ov .3Kg, in Saline (Kg)	966,039	536,854	16
2005700600 Olive Grn Not Pttd In Saline Gt 8 Kg Addl Note 4 (Kg)	928,188	761,658	17
2005709100 Olive Prep/Pres Othr Thn Saline Cntr Lt 13 Kg Etc (Kg)	823,414	345,032	18
2005702300 Olives Green Pttd/Stffd Place Packed Saline, Nesoi (Kg)	763,782	233,633	19
2005700800 Olives Grn Nt Pttd Cntr > 8 Kg Saline Nesoi (Kg)	669,008	497,353	20
2005700460 Olive Green Not Pttd Ctr 8 Kg/Less, Saline, Nesoi (Kg)	321,452	160,182	21
2005701800 Olives Green Pttd/Stffd in Cntnrs Lt 1Kg Drd Wght (Kg)	287,061	88,406	22
2005706060 Olives Not Green Chopped/Minced, Canned, in Saline (Kg)	203,523	219,871	23
2005709300 Olives Prep/Pres Except in Saline, Nt Frzn, Nesoi (Kg)	198,178	61,721	24
2005700430 Olive Grn Nt Ptd Ripe Cntr Lt 8 in Sal Nesoi Nt Fz (Kg)	180,731	133,163	25
2005705060 Olive Nt Green Nt Pittd Canned Nt Ov .3 Kg, Saline (Kg)	39,932	23,410	26
2005700260 Olive Grn Nt Pttd Ctr 8 Kg/Less Saline Nt Gt 730Mt (Kg)	20,355	8,400	27
2005700230 Olive Grn Nt Ptd Ripe Cntr Gt 8 in Saln Nt Gt 730T (Kg)	0	0	28

Green, whole stuffed olives in containers less than 8 kg represented almost 31 percent of total U.S. imports of olives, totalling $65.7 million in CIF value during 2002. The second largest category of import trade on the U.S. market is for sliced black olives in a can. These totalled $40.6 million in CIF value during 2002, representing 19.4 percent of total U.S. imports of olives.

Black whole olives and green broken or sliced, salad style olives were the third and fourth largest import categories, totalling $29.0 million and $13.7 million respectively. Whole green stuffed olives in HRI packs (larger than 8 kg) totalled $12.6 million.

These five import categories accounted for 77 percent of the total CIF value of U.S. imports of olives during CY 2002.

Major Suppliers of Table Olives to the U.S. Market

As mentioned above, Spain is by far the dominant supplier of olives to the U.S. market. But their market share is diminishing. Since 1999, which represented the peak year for Spanish olive exports to the USA, Spain's trade has decreased 8.4 percent, down from $144.1 million during CY1999. In terms of tonnage, Spain exported 62,098 MT during CY 2002, accounting to almost 66 percent of the total 94,245 MT the U.S. imported from all sources.

Greece continued to show steady gains from 1996 through 2001. They increased their exports of table olives to the USA by 143% over that period. Interestingly, they did not do this at the expense of the other major suppliers, indicating they obtained an increasing market share over those six years as USA imports grew. But their exports leaped by 154% from 2001 to 2002. And this was at the expense of Spain, both in market share and at a higher entry price of almost 5%. Greece enjoyed a CIF market share in CY 2002 of 20.7 percent of the total U.S. import market for olives. In terms of tonnage, Greece exported 11,006 MT, representing 11.7 percent of the total quantity imported by the U.S. in CY 2002.

Morocco was the third leading exporter of olives to the U.S. market during CY 2002 and their market share increased 12.1 percent over the level of $17.7 million imported by the U.S. during CY 2001. Morocco has shown steady gains over the seven-year period from 1996 to 2002, albeit small. Their exports to the USA in terms of CIF value increased 11 percent, however their market share has decreased from 10 percent to 9.5 percent over the same period. And Morocco has had to discount in order to gain those exports. Their CIF average entry prices are 15% Spain's and about 19% below Greece. But this demonstrates the strategy of buying market share, as referred to above in our recommendations to Egyptian table olive processors. At least, the prices are higher than if wholesaled to Spain! Total tonnage of olives exported by Spain to the U.S. market during CY 2002 was 10,961 MT, representing 11.6 percent of the total quantity imported by the U.S. during CY 2002.

These top three supplying countries therefore supplied 93.2 percent of total U.S. imports of all olive products, on a CIF value basis. The volume of their CY 2002 exports of olive products to the U.S. market totalled 84,065 MT, which accounted for 89.2 percent of the total tonnage imported last year. This spread indicates that the three countries are exporting the higher valued, or top ranked table olives, leaving the lower valued products to other countries. Following is a more detailed review of each of the major suppliers:

Spain

The U.S. import market for olives is dominated by Spain, which supplied 63 percent of the total trade in these products. During CY 2002, the U.S. imported 62,098 MT of olives Spain, at a CIF value of $132.0 million, which represented a decrease of 3 percent in terms of CIF value over the CY 2001 trade level.

The largest product in Spain's olive trade with the U.S. during CY 2002 was Olives, Green, Whole, Stuffed, In Containers Less Than 8 Kg, In Saline Solution, Not Frozen. Spain was also the dominant supplier to the U.S. market within this tariff classification category, shipping 98.5 percent of total U.S. imports of this olive product, at a CIF value of $65.2 million. Average CIF import prices from Spain during CY 2002 for this olive product were $2.8 per kilogram.

The second leading olive product shipped by Spain to the U.S. market during CY 2002 was Olives, Not Green In Color, Sliced, Canned In A Saline Solution, Not Frozen. Spain was also the dominant supplier to the U.S. market within this tariff classification category, shipping 65.7 percent of total U.S. imports of this olive product, at a CIF value of $24.1 million. Average CIF import prices from Spain during CY 1999 for this olive product were $1.9 per kilogram.

The third leading olive product shipped by Spain to the U.S. market during CY 2002 was Olives, Green, Broken, Sliced Or Salad Style, Containers Holding Less Than 8 KG, In A Saline Solution, Not Frozen. Here again, Spain was also the dominant supplier to the U.S. market within this tariff classification category, shipping 90.4 percent of total U.S. imports of this olive product, at a CIF value of $11.0 million. Average CIF import prices from Spain during CY 2002 for this olive product were $2.1 per kilogram.

The fourth leading olive product shipped by Spain to the U.S. market during CY 2002 was Olives, Green, Whole, Stuffed, In Saline Solution, In Containers Holding More Than 8 KG Each, Not Frozen. As in the above three product categories, Spain was again the dominant supplier to the U.S. market within this tariff classification category, shipping 96.6 percent of total U.S. imports of this olive product, at a CIF value of $7.1 million. Average CIF import prices from Spain during CY 1999 for this olive product were $1.62 per kilogram.

Table 8 below shows total U.S. imports of olive products, by USHTS code, from Spain during CY 1995 – 2002.

Greece

The second leading supplier of olives to the U.S. market is Greece, which had a market share on a CIF value basis of 14.2 percent last year. During CY 2002, the U.S. imported 11,006 MT of olives from Greece, at a CIF value of $43.3 million, which represented an increase of 54 percent in terms of CIF value over the CY 2001 trade level.

Even though Greece ships olives that enter the U.S. under many different tariff classification categories, most of this trade with the U.S. during CY 1999 was Olives, Not Green in Color, Not Canned, In Saline Solution, Not Frozen, NESOI. Total U.S. imports from Greece under this product category were $23.5 million during CY 2002, representing almost 77 percent of the total Greek olive trade with the U.S. last year. Greece was also the dominant exporter of this product category to the U.S. market last year, supplying almost 82 percent of total U.S.

imports during CY 2002. Average CIF import prices from Greece during CY 2002 for this olive product were $2.8 per kilogram.

Table 9 below shows total U.S. imports of olive products, by USHTS code, from Greece during CY 1995 – 2002.

Morocco

The third leading supplier of olives to the U.S. market is Morocco, which had a market share on a CIF value basis of 9.5 percent last year. During CY 2002, the U.S. imported 10,961 MT of olives from Morocco, at a CIF value of $17.7 million, which represented an increase of 12.1 percent in terms of CIF value over the CY 2001 trade level.

The largest product in Morocco's olive trade with the U.S. during CY 2002 was Olives, Not Green in Color, Sliced, Canned In A Saline Solution, Not Frozen. Morocco was the second leading supplier to the U.S. market within this tariff classification category after Spain, shipping 34 percent of total U.S. imports of this olive product, at a CIF value of $12.5 million. Average CIF import prices from Morocco during CY 2002 for this olive product were $1.95 per kilogram, which was higher than the average CIF import price for this product from Spain last year, valued at $1.76 per kilogram on average.

The second leading olive product shipped by Morocco to the U.S. market during CY 2002 was Olives, Not Green In Color, Other, Including Wedged Or Broken, Canned In A Saline Solution, Not Frozen. Within this tariff classification category, Morocco was the leading supplier to the U.S. market, shipping 78.6 percent of total U.S. imports of this olive product, at a CIF value of $3.7 million. Average CIF import prices from Morocco during CY 2002 for this olive product were $1.67 per kilogram.

The third leading olive product shipped by Morocco to the U.S. market during CY 2002 was Olives, Not Green in Color, Not Canned, In A Saline Solution, Not Frozen, NESOI. Morocco's share of the U.S. import market within this tariff classification category was 5.6 percent of total U.S. imports of this olive product, with exports valued at $1.5 million on a CIF basis. Average CIF import prices from Morocco during CY 2002 for this olive product were $1.31 per kilogram. Within this product category, Greece is the leading supplier of this olive product to the U.S. market, with a market share of 81 percent on a CIF value basis during CY 1999. Average CIF import prices for this olive product from Greece last year were $2.42 per kilogram, significantly higher (85 percent) than the average CIF import price for this olive product from Morocco during CY 2002.

The fourth leading olive product shipped by Morocco to the U.S. market during CY 2002 was Olives, Green, Broken, Sliced Or Salad Style, In Containers Holding Less Than 8 KG, In A Saline Solution, Not Frozen. The total CIF value of Morocco's CY 2002 exports to the U.S. market for this olive product reached almost $1 million, up 108 percent over the level of CY 1998. This level of trade accounted for 5.7 percent of total U.S. imports of this olive product last year. Within this tariff classification category, Spain is the dominant supplier to the U.S. market, accounting for 90 percent of total U.S. imports on a CIF value basis during CY 2002. Average CIF import prices from Morocco during CY 2002 for this olive product were $1.80 per kilogram. Spain's average price, at $2.32 per kilogram, was significantly higher (29 percent) last year than Morocco's average CIF import price for this olive product.

Table 10 below shows total U.S. imports of olive products, by USHTS code, from Morocco during CY 1995 – 2002.

Table 6 List of supplying markets Product : 200570 Olives prepared o preserved imported by United States of America in 2001

United States of America's imports represent 36% of world imports for this product, its ranking in world imports is 1

Exporters	Imported value 2001 in US$ thousand	Share in United States of America's imports, %	Imported quantity 2001	Quantity unit	Unit value (US$/unit)	Import trend in value between 1997-2001, %, p.a.	Import trend in quantity between 1997-2001, %, p.a.	Import growth in value between 2000-2001, %, p.a.	Ranking of partner countries in world exports	Share of partner countries in world exports, %	Total export growth in value of partner countries between 1997-2001, %, p.a.
World	220,761	100	101,882	Tons	2,167	3	7	8			-1
Spain	157,119	71	71,515	Tons	2,197	3	8	5	1	57	4
Greece	31,713	14	13,744	Tons	2,307	6	16	15	2	13	-9
Morocco	19,782	9	10,519	Tons	1,881	-3	-2	15	3	12	-5
Italy	3,678	2	1,186	Tons	3,101	6	11	7	6	2	20
Turkey	3,057	1	2,545	Tons	1,201	-3	4	105	5	4	1
France	2,152	1	651	Tons	3,306	5	7	-5	7	2	0
Israel	902	0	401	Tons	2,249	-2	3	-7	13	0	-6
Portugal	746	0	498	Tons	1,498	-25	-19	-1	8	1	-7
Peru	459	0	247	Tons	1,858	10	9	10	21	0	-2
Mexico	128	0	67	Tons	1,910			36	33	0	-7
Chile	121	0	71	Tons	1,704	-7	-7	-60	27	0	-33
Lebanon	110	0	63	Tons	1,746	7	9	233	25	0	6
United Kingdom	76	0	12	Tons	6,333	49	38	130	20	0	11
Syrian Arab Republic	67	0	51	Tons	1,314	-16	-5	16	15	0	23
Jordan	66	0	58	Tons	1,138	206	183	560	17	0	10
Honduras	64	0	69	Tons	928	3	3	-14	35	0	3
Argentina	53	0	26	Tons	2,038	-3	-4	-46	4	6	-15
Croatia	46	0	16	Tons	2,875	53	56	0	18	0	20
Tunisia	35	0	5	Tons	7,000	41	44	25	23	0	-8

Table 7 US Imports of Table Olive by Type

Time / Item / Commodity	1995 Value (Dollars)	1995 Quantity	1996 Value (Dollars)	1996 Quantity	1997 Value (Dollars)	1997 Quantity	1998 Value (Dollars)	1998 Quantity	1999 Value (Dollars)	1999 Quantity	2000 Value (Dollars)	2000 Quantity	2001 Value (Dollars)	2001 Quantity	2002 Value (Dollars)	2002 Quantity	Rank by Value 2002
570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	174,170,152	0	177,632,827	0	180,519,219	0	173,159,566	0	200,514,146	0	181,269,994	0	193,558,872	0	209,442,207	0	
[illegible] Olive Green Whole Stuffd Cntr Less Than 8Kg Saline (Kg)	67,835,266	19,106,086	61,712,427	18,634,655	63,440,971	22,761,294	62,123,843	24,568,783	78,457,436	27,904,850	69,289,346	28,340,846	71,231,912	29,013,693	65,671,985	27,621,479	1
[illegible] Olives Not Green, Sliced Canned in Saline Solution (Kg)	24,275,488	11,388,753	33,024,021	14,384,414	32,975,568	17,257,893	28,574,199	17,136,142	29,466,994	17,884,563	32,301,790	22,065,445	35,921,754	24,419,058	40,610,840	28,143,978	2
[illegible] Olives Not Green, Not Canned, in Saline, Nesoi (Kg)	13,240,160	6,115,411	18,180,283	7,931,885	20,496,476	8,628,295	23,212,742	9,824,922	24,442,521	11,722,793	17,489,765	9,921,254	17,462,896	10,877,251	29,071,506	12,364,072	3
[illegible] Olives Prep, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	2,330,431	879,646	2,765,785	980,073	4,173,322	1,253,856	4,373,847	1,250,122	5,597,315	1,675,254	6,545,605	2,337,959	8,878,974	3,515,601	13,734,054	3,746,328	4
[illegible] Olive Green Sliced/Stuffed Less Than 8Kg Saln (Kg)	14,520,871	5,841,522	14,071,590	5,718,620	15,336,172	7,208,727	14,301,240	7,417,434	15,658,410	7,807,841	12,588,359	7,582,412	13,209,624	7,831,442	12,602,159	7,330,607	5
[illegible] Olive Green, Not Pitted in Saline, Nesoi, Nt Fro (Kg)	3,010,597	1,056,132	3,991,008	1,439,274	4,053,121	1,723,855	4,198,621	1,869,262	5,617,430	2,354,295	6,843,878	3,644,419	7,724,819	3,744,287	8,707,936	3,693,893	6
[illegible] Olive Green Whole Stuffed Ctr Over 8 Kg in Saline (Kg)	14,823,571	6,418,910	12,936,654	6,584,484	9,196,586	5,707,887	8,967,661	6,577,064	11,235,449	6,228,673	8,104,070	5,702,886	9,247,145	6,578,616	8,032,617	6,005,922	7
[illegible] Olives Nt Green Whole Pitted Canned Ov 3Kg Saline (Kg)	5,188,765	2,832,066	5,184,915	1,933,257	5,352,639	2,424,698	4,944,673	2,626,013	3,838,240	2,176,245	3,996,442	2,567,745	5,335,104	3,253,313	4,746,239	3,092,431	8
[illegible] Olives Grn Stfd Packed Saline [illegible] (Kg)	5,999,535	935,981	5,224,523	821,540	5,156,944	1,018,695	4,847,372	1,189,235	5,172,286	1,040,204	4,402,293	978,290	3,931,252	790,601	4,323,314	847,504	9
[illegible] Olives, Green, Whole, Pitted, Cntr Ov 8 Kg, Saline (Kg)	2,159,617	767,642	2,037,727	877,312	2,688,920	1,174,190	2,189,538	1,093,145	3,664,262	1,370,426	4,042,030	1,513,733	3,426,513	3,327,453	4,124,744	1,724,237	10
[illegible] Olives Nt Green, Wedged or Broken Canned in Saline (Kg)	6,609,838	3,302,291	4,992,808	2,362,644	6,161,654	3,204,841	4,485,239	2,632,868	4,280,929	2,800,970	3,428,329	2,294,543	4,195,848	2,926,043	3,387,235	2,251,785	11
[illegible] Olive Green Whole Pitd Cntr Less Than 8 Kg Saline (Kg)	2,194,510	578,721	2,203,600	641,039	2,252,857	872,030	2,086,172	891,416	3,051,684	1,043,701	2,660,070	1,196,804	2,792,530	1,105,291	3,163,646	1,373,270	12
[illegible] Olive Nt Green Whole Pitted Canned Lt 3 Kg Saline (Kg)	1,135,650	426,512	1,224,887	445,237	979,166	447,199	1,246,287	623,431	1,649,127	858,575	2,217,457	1,318,519	2,619,384	1,510,538	2,256,356	1,342,802	13
[illegible] Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	3,593,011	2,367,093	3,603,811	2,393,533	2,126,096	1,861,300	1,997,969	2,018,433	2,395,458	2,136,306	1,713,531	1,924,249	1,657,994	2,005,341	1,855,561	2,394,088	14
[illegible] Olive Nt Green Nt Canned, [illegible] (Kg)	807,861	304,395	1,139,314	346,959	866,519	260,651	783,060	248,132	878,355	294,854	1,154,346	544,470	870,916	342,199	1,752,342	510,942	15
[illegible] Olive Nt Green Nt Pitd, Canned Ov 3Kg, in Saline (Kg)	728,688	326,516	823,045	316,948	735,403	298,893	358,418	170,697	578,202	274,500	475,035	251,408	757,685	429,035	966,039	526,854	16
[illegible]	1,937,055	1,017,702	1,848,149	1,135,406	1,856,461	1,168,306	1,667,132	1,093,173	1,853,501	904,201	1,349,735	975,783	538,941	340,655	926,198	761,658	17
[illegible]	737,739	327,534	904,249	255,527	1,082,267	460,419	712,677	292,586	578,704	245,315	853,797	354,663	575,280	273,193	823,414	345,032	18
[illegible]	851,400	187,149	706,029	190,331	542,537	234,537	1,140,231	447,895	525,686	183,062	724,502	299,654	871,093	261,141	753,782	233,633	19
[illegible]	299,722	96,046	333,803	75,108	140,275	42,745	156,119	68,861	278,612	92,450	250,799	100,623	946,873	548,139	669,008	497,353	20
[illegible]	255,214	54,394	122,530	31,691	127,724	28,920	178,115	59,119	217,966	71,779	183,467	90,137	256,058	131,741	321,452	160,192	21
[illegible]	334,902	63,239	201,928	74,128	256,578	74,905	243,025	62,265	285,905	70,881	275,404	68,607	672,432	229,922	287,061	98,406	22
[illegible]	76,763	25,909	3,554	1,195	22,390	16,640	22,655	13,563	5,680	2,441	89,456	89,614	16,306	12,143	203,523	219,671	23
[illegible]	903,444	266,930	613,700	161,589	306,306	79,351	103,383	25,710	399,409	138,353	171,060	78,108	286,624	88,093	198,178	61,721	24
[illegible]	63,564	26,400	23,340	6,144	17,731	3,473	37,057	15,502	187,660	123,050	75,654	41,078	151,542	114,989	180,731	133,163	25
[illegible]	51,375	18,292	82,539	28,717	92,567	41,049	164,121	86,359	45,969	19,326	66,911	44,718	112,454	62,394	39,932	23,410	26
[illegible]	83,424	29,649	60,541	17,456	78,310	22,278	10,072	4,556	50,756	26,470	4,378	1,152	45,529	25,753	20,355	8,400	27
[illegible]	131,685	79,341	16,068	5,918	3,660	2,196	28,098	21,404	0	0	12,495	8,320	113,501	42,479	0	0	28

Table 8 Spain Exports of Table Olives Into the United States Market by Type

Time	1995		1996		1997		1998		1999		2000		2001		2002		Rank by
Item	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value (Dollars)	Quantity	Value 2002
HS Commodity																	
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	134,994,495	0	129,128,355	0	126,042,698	0	122,410,924	0	144,140,797	0	131,094,149	0	136,672,317	0	131,956,633	0	
[illegible]	67,367,972	15,909,516	61,352,853	18,475,952	63,030,831	22,632,244	61,827,365	24,495,001	77,260,816	27,446,891	68,193,270	27,812,478	70,852,015	28,884,441	65,193,306	27,473,242	
[illegible]	15,013,695	6,913,945	20,382,272	9,209,375	18,280,458	9,836,225	17,400,357	10,867,162	19,206,999	12,166,134	20,044,661	15,106,921	22,940,439	17,310,077	24,128,220	19,410,521	
[illegible]	13,246,593	5,145,452	12,721,853	5,145,729	13,600,216	6,212,152	13,337,686	6,809,176	14,112,176	6,810,153	11,203,525	6,595,245	11,987,774	7,119,269	10,990,640	6,603,273	
[illegible]	13,321,402	5,820,266	12,621,715	6,356,269	8,877,145	5,481,413	8,553,113	6,568,239	10,849,516	5,978,295	7,848,024	5,563,527	7,903,200	5,896,426	7,114,803	5,586,454	
[illegible]	3,697,017	1,399,931	3,141,615	1,724,405	3,918,940	1,773,457	3,801,618	2,092,840	3,185,730	1,623,100	3,436,867	2,293,682	4,596,121	2,862,617	4,173,658	2,774,429	
[illegible]	5,842,973	806,362	5,117,454	[illegible]	5,014,503	978,773	4,722,792	1,139,954	5,063,729	967,194	[illegible]	930,440	[illegible]	782,749	4,118,063	818,119	
[illegible]	1,700,213	405,109	1,535,794	573,119	2,306,562	964,100	1,889,187	940,639	2,000,295	953,470	[illegible]	1,200,028	2,176,290	834,638	3,456,062	1,437,427	
[illegible]	1,356,159	606,740	2,177,011	534,093	1,621,545	840,415	2,151,751	1,073,717	2,548,190	1,236,947	3,347,814	2,069,801	3,019,065	1,710,527	3,097,107	1,802,498	
[illegible]	1,020,006	490,066	1,707,299	605,626	1,096,606	724,626	1,201,562	699,869	2,362,257	704,868	2,130,815	887,561	2,262,075	862,363	2,416,869	897,731	
[illegible]	952,400	361,747	1,122,224	406,147	606,840	312,845	1,152,364	574,799	1,537,890	796,024	2,180,947	1,303,000	2,409,113	1,476,863	2,232,365	1,311,369	
[illegible]	2,098,090	1,966,641	3,091,520	2,049,910	1,685,800	1,460,722	1,820,208	1,805,987	1,782,985	1,809,232	1,507,797	1,890,214	1,224,723	1,695,912	1,808,024	2,260,649	
[illegible]	3,179,660	1,613,930	888,351	389,029	1,952,851	877,271	1,813,654	956,722	800,801	540,240	1,898,669	1,299,870	1,306,302	983,343	1,598,869	1,072,590	
[illegible]	190,135	83,903	98,500	38,753	133,572	61,798	54,798	33,805	22,951	26,599	74,369	58,802	298,137	177,064	331,260	251,706	
[illegible]	147,984	37,806	275,753	64,208	89,077	33,196	46,368	17,054	143,204	50,054	152,294	50,363	200,334	190,167	241,419	260,712	
[illegible]	306,593	52,453	190,561	73,736	136,649	36,172	195,470	50,744	196,152	50,783	231,634	51,569	367,397	163,051	209,859	59,675	
[illegible]	4,549	2,283	0	0	22,390	16,640	22,655	13,563	5,680	2,441	63,036	42,686	13,300	9,430	200,413	219,507	
[illegible]	80,758	33,532	89,200	37,725	0	0	96,430	73,393	169,724	95,261	13,054	9,435	81,600	56,207	191,517	172,999	
[illegible]	3,627	1,440	76,777	35,305	125,465	60,510	116,170	67,723	130,857	87,594	208,355	137,351	264,711	215,134	187,542	150,737	
[illegible]	249,335	107,701	106,520	85,724	125,386	58,690	159,084	78,127	87,275	52,305	200,796	131,779	153,745	113,066	183,655	73,465	
[illegible]	1,149,061	561,569	929,866	561,803	636,427	462,357	780,430	590,881	1,135,012	465,776	453,251	326,975	138,489	73,308	137,936	118,089	
[illegible]	822,915	175,540	680,066	156,109	453,327	664,779	265,151	157,436	32,150	17,781	99,452	52,817	98,670	60,330	72,180	45,388	
[illegible]	109,796	43,510	4,174	1,706	5,771	1,076	70,487	31,614	16,125	9,434	17,546	3,622	11,384	4,576	69,250	27,095	
[illegible]	56,729	18,143	58,361	18,516	18,301	5,858	42,003	25,142	35,495	12,686	66,295	38,472	69,530	42,333	40,250	23,527	
[illegible]	22,374	8,747	3,530	685	52,934	25,962	71,246	30,071	11,944	4,322	59,121	42,300	22,832	17,466	13,242	10,652	
[illegible]	0	0	9,060	3,544	0	0	12,560	5,859	5,682	1,869	21,330	11,416	49,953	21,412	8,492	7,203	
[illegible]	41,697	17,412	0	0	0	0	0	0	32,447	18,569	0	0	0	0	4,679	1,411	
[illegible]	46,041	12,698	17,282	6,181	0	0	4,327	2,131	6,015	2,087	0	0	19,516	17,136	4,851	1,895	
[illegible]	0	0	5,041	1,102	0	0	12,690	9,858	0	0	0	0	0	0	0	0	

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Table 9 Greece Exports of Table Olives Into the United States Market by Type

Time / Item / HS Commodity	1995 Value (Dollars)	1995 Quantity	1996 Value (Dollars)	1996 Quantity	1997 Value (Dollars)	1997 Quantity	1998 Value (Dollars)	1998 Quantity	1999 Value (Dollars)	1999 Quantity	2000 Value (Dollars)	2000 Quantity	2001 Value (Dollars)	2001 Quantity	2002 Value (Dollars)	2002 Quantity	Rank by Value 2002
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	16,239,280	0	19,636,892	0	21,851,901	0	25,300,641	0	28,333,978	0	24,750,411	0	28,123,684	0	43,335,273	0	
[illegible]	11,177,861	5,035,097	14,712,852	6,295,581	15,197,914	5,486,993	19,090,586	7,669,572	19,802,472	8,895,277	13,704,964	7,665,997	13,462,939	7,822,208	23,524,328	8,765,427	1
[illegible]	1,802,738	628,290	2,175,341	710,410	3,500,835	905,365	3,592,196	922,309	4,259,636	1,289,862	5,568,820	1,970,791	7,658,501	2,889,964	12,040,975	3,038,961	2
[illegible]	273,141	166,607	512,969	221,649	487,666	177,667	393,382	168,373	775,881	297,098	1,161,240	520,604	2,175,380	852,990	3,186,726	1,001,664	3
[illegible]	389,682	156,981	448,053	124,807	529,324	135,721	372,413	84,598	567,504	149,690	712,297	302,358	463,512	129,585	1,127,107	264,773	4
[illegible]	478,224	234,433	193,011	126,383	531,414	230,842	273,220	132,582	226,144	149,437	398,028	231,180	334,720	197,296	626,815	242,214	5
[illegible]	68,882	21,617	87,002	20,442	76,459	24,588	6,310	2,730	38,417	19,474	552,769	222,127	1,065,414	405,525	691,252	284,339	6
[illegible]	5,928	1,200	7,386	1,011	17,801	4,200	0	0	87,596	28,337	142,943	72,794	842,587	380,731	495,329	213,960	7
[illegible]	490,109	271,802	470,446	269,792	621,967	271,973	666,981	290,914	580,846	391,333	704,660	505,133	268,553	161,851	425,100	271,669	8
[illegible]	14,458	1,821	57,712	9,721	84,684	13,467	65,929	9,321	852,909	316,557	821,339	418,811	157,198	44,152	221,387	45,241	9
[illegible]	43,053	12,933	9,010	2,000	50,371	39,234	43,620	28,137	181,562	79,563	171,491	82,154	158,785	61,089	206,527	111,887	10
[illegible]	46,035	25,714	86,173	3,650	0	0	43,114	23,115	5,105	3,900	58,431	34,672	429,678	291,211	208,270	129,518	11
[illegible]	64,912	39,723	108,063	46,103	50,788	34,762	33,210	19,720	86,546	45,729	71,302	62,817	173,789	114,645	174,785	70,432	12
[illegible]	243,625	114,840	200,972	86,330	120,653	42,271	104,240	42,700	234,575	101,595	106,999	60,826	145,488	99,296	152,207	59,429	13
[illegible]	0	0	14,280	2,800	0	0	12,287	5,550	6,480	2,160	54,316	29,660	44,928	27,041	92,535	49,490	14
[illegible]	10,419	2,640	18,260	4,000	24,398	3,950	14,431	3,836	75,141	28,997	40,942	19,933	39,183	24,277	89,646	16,826	15
[illegible]	21,470	15,152	51,473	30,601	95,917	61,770	105,675	63,311	38,590	26,706	55,489	35,670	163,708	85,760	68,152	39,281	16
[illegible]	549,136	151,643	95,415	34,036	146,257	35,831	9,213	2,352	67,234	40,982	68,123	31,207	2,613	259	40,428	15,192	17
[illegible]	0	0	0	0	67,323	8,426	45,375	9,878	86,653	19,273	29,671	11,819	250,952	62,316	39,786	10,429	18
[illegible]	76,784	29,477	44,765	9,650	73,407	15,386	49,597	11,482	99,985	51,310	94,191	44,144	7,881	1,112	20,280	5,520	19
[illegible]	162,753	59,533	222,281	66,921	93,607	22,841	168,581	48,539	176,813	82,812	184,628	77,181	129,286	72,128	10,319	3,600	20
[illegible]	8,130	1,914	0	0	4,545	977	114,258	20,210	22,847	4,787	5,432	1,056	2,198	1,200	2,449	536	21
[illegible]	67,258	41,545	2,514	350	3,660	2,196	15,400	11,540	0	0	0	0	7,093	4,925	0	0	22
[illegible]	17,754	9,715	4,805	963	0	0	2,800	1,600	28,681	10,271	4,378	1,152	0	0	0	0	23
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	24
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	25
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	26
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	27
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	28
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	29
[illegible]	0	0	14,923	6,749	0	0	34,385	26,857	28,097	10,212	0	0	17,728	10,183	0	0	30
[illegible]	13,861	2,804	1,636	30	21,371	3,465	0	0	3,071	1,999	8,346	1,886	77,680	17,099	0	0	31
[illegible]	180,178	87,903	108,875	34,390	39,937	7,730	0	0	0	0	12,869	8,181	0	0	0	0	32
[illegible]	37,050	7,200	0	0	0	0	0	0	0	0	0	0	0	0	0	0	33
[illegible]	16,850	3,370	0	0	20,127	6,532	43,857	15,380	39,242	13,889	21,670	9,360	4,713	3,350	0	0	34

Table 10 Morocco Exports of Table Olives into the United States Market by Type

HS Commodity	Quantity	Value (Dollars) 1996	Quantity 1996	Value (Dollars) 1997	Quantity 1997	Value (Dollars) 1998	Quantity 1998	Value (Dollars) 1999	Quantity 1999	Value (Dollars) 2000	Quantity 2000	Value (Dollars) 2001	Quantity 2001	Value (Dollars) 2002	Quantity 2002	Rank by Value 2002
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	0	17,852,956	0	22,116,549	0	14,864,190	0	17,615,787	0	15,510,517	0	17,783,054	0	19,978,336	0	
[illegible]	3,515,777	8,935,571	3,853,898	13,207,842	6,864,358	10,194,760	5,667,455	10,188,899	5,673,781	11,836,645	6,661,815	12,495,465	6,696,937	15,633,218	8,231,561	1
[illegible]	1,725,941	4,071,991	1,962,069	4,045,674	2,128,340	2,705,168	1,603,929	3,380,029	2,217,160	1,498,934	973,823	2,859,006	1,948,214	1,739,525	1,147,229	2
[illegible]	250,411	807,343	372,229	991,150	821,394	672,478	472,764	1,348,102	1,127,151	781,564	657,012	956,683	811,670	1,525,247	1,185,949	3
[illegible]	420,722	387,014	425,190	1,212,157	729,528	431,482	273,991	919,779	554,514	590,011	380,994	455,677	267,333	293,658	179,211	4
[illegible]	47,250	5,138	2,282	35,294	20,345	14,550	11,200	63,257	41,875	139,449	138,449	179,633	184,840	281,443	204,312	5
[illegible]	172,061	224,346	140,458	312,571	225,362	60,978	46,200	364,273	253,046	178,795	157,092	316,603	270,010	266,603	205,054	6
[illegible]	395,340	1,092,742	407,659	761,212	585,217	401,296	240,111	383,332	214,183	174,313	112,559	329,440	161,030	182,259	105,629	7
[illegible]	11,200	94,930	49,478	3,100	814	60,769	52,164	69,920	55,635	94,380	79,100	84,979	59,592	35,731	27,453	8
[illegible]	5,075	0	0	0	0	0	0	0	0	0	0	8,040	6,800	19,548	20,580	9
[illegible]	46,429	93,555	41,776	92,899	57,132	5,510	3,940	37,139	28,957	11,340	8,316	5,625	5,100	7,850	7,342	10
[illegible]	227,960	372,700	257,690	165,651	142,800	130,159	100,772	247,083	187,980	30,344	30,174	11,339	11,000	4,254	4,800	11
[illegible]	0	0	0	0	0	0	0	0	0	7,815	5,720	0	0	0	0	12
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	13
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14
[illegible]	0	1,684	825	0	0	0	0	0	0	0	0	0	0	0	0	15
[illegible]	25,730	291,056	243,040	106,916	103,060	27,884	24,573	44,846	37,792	66,435	67,220	12,050	7,812	0	0	16
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	17
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	18
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	19
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20
[illegible]	0	0	0	21,773	9,863	0	0	0	0	0	0	0	0	0	0	21
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	22
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	23
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	24
[illegible]	1,089	0	0	0	0	0	0	0	0	3,716	2,640	0	0	0	0	25
[illegible]	519,538	270,845	208,404	209,434	159,621	0	0	122,870	98,050	29,197	30,365	12,320	11,200	0	0	26
[illegible]	191,970	193,203	185,160	273,271	289,114	68,980	83,923	144,364	122,560	44,590	70,112	48,721	48,193	0	0	27
[illegible]	156,009	180,947	105,740	145,712	149,040	6,102	605	77,183	60,900	0	0	0	0	0	0	28
[illegible]	1,610	0	0	18,129	8,534	2,316	1,659	5,208	3,772	0	0	15,000	12,275	0	0	29
[illegible]	23,329	76,218	29,475	202,640	99,203	51,939	29,201	94,397	54,442	13,104	9,430	0	0	0	0	30
[illegible]	0	0	0	0	0	0	0	0	0	6,552	4,715	0	0	0	0	31
[illegible]	2,204	43,981	17,984	17,040	10,305	29,804	16,911	44,829	27,493	5,625	4,125	0	0	0	0	32
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	33
[illegible]	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	34
[illegible]	4,910	105,041	98,711	165,879	109,481	0	0	0	0	0	0	0	0	0	0	35
[illegible]	15,000	0	0	0	0	0	0	0	0	0	0	2,272	865	0	0	36

Table 11 Italy Exports of Table Olives into the United States Market by Type

Time / Item / HS Commodity	1995 Value (Dollars)	1995 Quantity	1996 Value (Dollars)	1996 Quantity	1997 Value (Dollars)	1997 Quantity	1998 Value (Dollars)	1998 Quantity	1999 Value (Dollars)	1999 Quantity	2000 Value (Dollars)	2000 Quantity	2001 Value (Dollars)	2001 Quantity	2002 Value (Dollars)	2002 Quantity	Rank by Value 2002
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	1,562,358	0	2,549,760	0	2,343,123	0	3,954,622	0	3,597,497	0	3,154,111	0	3,410,973	0	4,564,619	0	
2005701200 Olive, Green, Not Pitted, In Saline, Nesoi, Nt Fro (Kg)	301,521	66,136	720,762	155,029	675,018	150,339	852,409	261,108	610,287	219,751	777,420	295,477	934,536	352,923	1,150,651	364,633	1
2005707500 Olives Not Green, Not Canned, In Saline, Nesoi (Kg)	406,412	152,466	643,999	211,575	914,519	313,867	1,257,398	405,465	1,132,164	390,610	833,711	315,523	795,273	325,076	929,414	335,153	2
2005709700 Other Vegs, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	143,283	25,705	152,577	27,830	150,143	28,731	311,166	87,551	364,576	78,789	323,336	85,662	269,966	76,387	670,304	169,310	3
2005702900 Olives Green Pit/Stfd Place Packed Saline, Nesoi (Kg)	9,891	2,506	2,774	824	12,837	4,301	568,406	168,188	536,689	123,093	470,517	139,795	498,341	126,609	592,941	143,723	4
2005706000 Olive Nt Green Nt Pitd, Canned Ov .3Kg, In Saline (Kg)	33,096	6,536	90,671	19,131	41,958	14,289	52,794	8,633	77,720	22,174	134,087	49,669	146,736	48,075	308,300	94,774	5
2005707000 Olive Nt Green Nt Canned, Except Metal Airtite Cn (Kg)	21,096	4,193	279,480	71,308	29,844	8,612	95,491	13,940	47,723	8,759	68,184	21,678	64,193	17,953	184,699	64,755	6
2005700000 Olives Grn Nt Pitd Cntr > 8 Kg Saline Nesoi (Kg)	72,530	18,897	0	0	36,311	5,845	56,682	17,146	118,565	34,167	28,091	9,538	89,794	36,928	150,784	64,019	7
2005700000 Olive Green Not Pitd Cn 8 Kg/Less, Saline, Nesoi (Kg)	166,837	29,902	37,347	5,766	55,344	7,137	115,154	26,216	93,972	23,000	64,493	25,358	112,800	37,605	100,066	29,079	8
2005710500 Olive Green Broken/Slcd/Salad Less Than 8Kg Saln (Kg)	68,508	8,788	107,068	23,432	40,513	6,352	105,778	17,678	65,183	17,323	113,898	36,084	81,474	24,418	96,797	34,280	9
2005702500 Olive Green Whole Stuffd Cntr Less Than 8Kg Saline (Kg)	1,804	650	29,665	16,337	43,371	13,428	159,421	47,915	129,785	38,468	28,131	9,319	47,660	26,597	62,881	38,666	10
2005702500 Olives, Green, Whole, Pitted, Cntr Ov 8 Kg, Saline (Kg)	1,440	312	8,793	1,394	0	0	2,400	500	4,685	2,325	0	0	87,245	30,000	60,561	9,204	11
2005701600 Olives Grn Stfd Packed Saline Not Ov 2700T/Yr (Kg)	8,574	3,000	1,340	85	5,043	1,606	11,510	2,903	8,573	1,700	0	0	18,403	3,900	55,086	5,981	12
2005702540 Olive Green Whole Pitd Cntr Less Than 8 Kg Saline (Kg)	19,726	3,991	175,767	36,866	32,392	20,572	90,684	25,655	216,546	51,752	27,599	6,902	14,378	3,289	41,873	11,483	13
2005100000 Olive Prep/Pres Othr Thn Saline Cnn Lt 8 Kg Etc (Kg)	46,007	8,548	69,191	15,199	44,372	9,102	54,585	14,064	73,835	14,264	140,570	26,304	72,664	15,560	36,560	8,848	14
2005706020 Olives Nt Green Whole Pitted Canned Ov .3Kg Saline (Kg)	18,196	5,000	24,721	4,000	13,331	6,921	30,815	12,132	3,640	1,943	27,422	11,326	13,342	5,279	28,586	5,019	15
2005709300 Olives Prep/Pres Except In Saline, Nt Frzn, Nesoi (Kg)	44,206	7,375	53,172	8,185	49,722	12,813	25,214	4,679	35,969	6,260	33,625	7,038	0	0	18,760	3,098	16
2005106070 Olives Nt Green, Wedged or Broken Canned in Saline (Kg)	9,289	2,391	10,851	3,780	26,686	21,818	32,661	8,384	21,350	4,464	0	0	13,122	3,760	18,003	3,961	17
2005703000 Olives Green Pitd/Stfd in Cntrs Lt Kg Dnd Wght (Kg)	0	0	3,367	392	0	0	0	0	0	0	0	0	3,600	1,626	17,435	9,500	18
2005702520 Olive Green Whole Stuffed Cntr Over 8 Kg, In Saline (Kg)	19,185	6,695	0	0	0	0	0	0	0	0	0	0	0	0	9,394	5,094	19
2005700420 Olive Grn Nt Pitd Ripe Cntr Lt 8 In Sal Nesoi Nt Fr (Kg)	63,564	26,400	0	0	2,578	660	8,744	590	12,131	3,211	0	0	0	0	8,138	4,501	20
2005700000 Olive Grn Nt Pitd Cn 8 Kg/Less Saline Nt Ov 730Mt (Kg)	8,114	3,000	25,709	6,697	62,680	10,728	0	0	0	0	0	0	0	0	7,867	2,106	21
2005710530 Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	0	0	3,458	3,380	4,071	3	0	0	15,220	5,937	14,400	14,060	0	0	6,895	7,200	22
2005706030 Olive Nt Green Whole Pitted Canned Lt .3 Kg Saline (Kg)	0	0	12,852	4,372	12,318	3,928	0	0	0	0	10,160	2,718	19,612	3,603	5,808	1,444	23
2005706000 Olive Nt Green Nt Pitd Canned Nt Ov .3 Kg Saline (Kg)	1,804	650	0	0	0	0	22,334	6,420	0	0	2,644	360	18,059	11,652	2,816	1,188	24
2005700230 Olive Grn Nt Pitd Ripe Cntr Ov 8 In Saln Nt Ov 730T (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	60,510	10,074	0	0	25
2005709000 Olive Grn Not Pitd in Saline Gt 8 Kg Addit Note 4 (Kg)	97,275	31,851	84,856	36,477	21,260	11,397	52,489	19,922	2,335	600	24,390	10,972	5,611	4,400	0	0	26
2005701000 Olive Grn Nt Pitd Ripe Cntr > 8 In Saline Nt >730T (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	27
2005701000 Olive Grn Nt Pitd Cn 8 Kg/Less, Saline Nt >730 Mt (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	28
2005701300 Olive Green Nt Pitd In Saline Nesoi, Per Us Note 4 (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	29
2005701500 Olive, Green, Not Pitted, In Saline, Nesoi (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	30
2005702100 Olives Green Stuffed Place Packed Saline Nt >2700T (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	31
2005702200 Olives Green Pit/Stfd Place Packed Saline, Nesoi (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	32
2005706050 Olives Not Green, Sliced Canned in Saline Solution (Kg)	0	0	11,340	4,717	68,812	36,964	48,417	28,749	26,549	16,574	24,565	15,663	23,654	18,602	0	0	33
2005706060 Olives Not Green Chopped/Minced, Canned, In Saline (Kg)	0	0	0	0	0	0	0	0	0	0	6,868	1,711	0	0	0	0	34

Table 12 Turkey Exports of Table Olives into the United States Market by Type

Time / Item / HS Commodity	1995 Value (Dollars)	1995 Quantity	1996 Value (Dollars)	1996 Quantity	1997 Value (Dollars)	1997 Quantity	1998 Value (Dollars)	1998 Quantity	1999 Value (Dollars)	1999 Quantity	2000 Value (Dollars)	2000 Quantity	2001 Value (Dollars)	2001 Quantity	2002 Value (Dollars)	2002 Quantity	Rank by Value 2002
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	1,253,776	0	1,119,309	0	3,064,011	0	1,543,493	0	2,048,239	0	1,330,610	0	2,661,592	0	3,014,351	0	
Olives Not Green, Not Canned in Saline, Nesoi (Kg)	350,715	291,424	755,380	517,949	1,941,056	1,340,110	1,002,594	717,567	873,592	717,943	453,618	510,293	1,000,230	1,211,833	1,490,266	1,091,981	1
Olive Green Whole Stuffed Ctr Over 8 Kg in Saline (Kg)	94,720	54,925	36,708	16,800	69,854	46,941	1,296	600	132,768	98,620	31,646	23,200	439,605	250,057	279,892	150,299	2
Olives Not Green, Sliced Canned in Saline Solution (Kg)	0	0	0	0	0	0	0	0	6,541	4,045	0	0	194,113	184,473	191,129	162,299	3
Other Vegs, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	0	0	0	0	6,987	3,253	7,257	2,799	24,981	16,417	57,724	16,278	54,805	21,856	185,052	116,733	4
Olives Nt Green Whole Pitted Canned Ov 3Kg Saline (Kg)	0	0	0	0	0	0	0	0	10,423	10,800	4,800	1,200	165,777	114,730	136,448	107,356	5
Olive Green Broken/Sliced/Salad Less Than 8Kg Saln (Kg)	274,388	216,000	19,148	16,321	194,939	134,143	141,409	157,679	273,480	312,579	378,697	418,012	187,739	198,717	135,360	131,162	6
Olive, Green, Not Pitted, In Saline, Nesoi, Nt Fz (Kg)	105,299	62,996	8,660	4,623	196,741	133,845	66,625	58,927	187,020	143,053	172,577	126,274	113,556	110,613	109,889	89,175	7
Olive Nt Green Nt Pitd Canned Ov 3Kg In Saline (Kg)	21,230	10,925	53,162	24,846	27,027	10,100	28,049	19,424	6,815	2,100	22,907	9,169	5,990	1,900	64,108	52,889	8
Olives Green Pitd/Stfd Place Packed Saline, Nesoi (Kg)	0	0	0	0	6,858	2,340	115,621	39,560	0	0	0	0	0	0	62,975	19,175	9
Olive Green Whole Stuffd Cntr Less Than 8Kg Saline (Kg)	5,100	3,000	3,743	1,080	103,409	45,596	0	0	7,123	7,997	71,849	44,000	54,415	30,144	48,237	26,323	10
Olive Nt Green Whole Pitted Canned Lt 3 Kg Saline (Kg)	0	0	0	0	0	0	10,730	3,647	3,334	3,695	0	0	11,821	11,151	45,117	28,985	11
Olives Grn Stfd Packed Saline Not Ov 2700T (Kg)	1,640	596	2,497	1,400	10,910	7,200	4,653	3,710	0	0	22,641	5,706	0	0	34,035	5,165	12
Olive Nt Green Nt Canned, Shipped Metal Airtite Ctr (Kg)	2,400	1,080	0	0	9,180	4,880	16,651	5,994	5,022	1,680	26,511	9,429	18,427	11,250	33,727	19,005	13
Olive Green Whole Pitd Cntr Less Than 8 Kg Saline (Kg)	1,416	464	1,293	420	13,436	15,209	12,680	15,985	0	0	0	0	53,454	29,000	30,972	44,409	14
Olive Prep/Pres Othr Thn Saline Cntr Lt 9 Kg Frz (Kg)	18,820	16,535	0	0	8,705	5,750	16,045	22,675	3,165	1,500	0	0	11,911	6,324	30,164	39,150	15
Olive Grn Nt Pitd Pipe Cntr Lt 8 In Sal Nesoi Nt Fz (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	10,800	21,600	29,958	36,600	16
Olive Nt Green Nt Pitd Canned Nt Ov 3 Kg Saline (Kg)	0	0	4,185	1,500	0	0	1,539	38	0	0	0	0	17,379	7,008	23,874	11,570	17
Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	175,486	104,303	209,661	128,984	113,065	101,881	65,966	99,240	244,230	218,895	56,605	78,315	151,031	211,570	23,429	21,306	18
Olive Grn Nt Pitd in Saline Ov 8 Kg Addl Note 4 (Kg)	131,900	97,120	0	0	308,161	229,680	29,607	17,972	31,633	23,235	31,036	26,713	72,599	73,040	23,023	24,640	19
Olives Nt Green, Wedged or Broken Canned in Saline (Kg)	0	0	0	0	1,460	1,500	0	0	9,158	12,756	0	0	0	0	20,854	13,133	20
Olive Green Sptr Pitd Ctr 8 Kg/Less Saline, Nesoi (Kg)	0	0	0	0	2,624	1,607	0	0	0	0	0	0	3,510	2,298	9,613	10,235	21
Olives, Green, Whole, Pitted, Cntr Ov 8 Kg Saline (Kg)	64,803	50,847	23,006	11,850	44,739	36,750	12,733	6,035	228,953	145,686	0	0	37,299	26,848	8,250	6,352	22
Olive Grn Nt Pitd Pipe Cntr Ov 8 In Saln Nt Ov 7xxT (Kg)	55,951	33,600	0	0	0	0	0	0	0	0	0	0	7,600	2,000	0	0	23
Olive Grn Nt Pitd Ctr 8 Kg/Less Saline Nt Ov 7xxT (Kg)	0	0	0	0	4,860	8,100	0	0	0	0	0	0	0	0	0	0	24
Olives Grn Nt Pitd Cntr > 8 Kg Saline Nesoi (Kg)	0	0	2,973	1,350	0	0	0	0	0	0	0	0	0	0	0	0	25
Olive Grn Nt Pitd Pipe Cntr > 8 in Saline Nt >7xxT (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	26
Olive Grn Nt Pitd Ctr 8 Kg/Less Saline Nt >7xx MT (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	27
Olive Green Nt Pitd in Saline Nesoi, Per Us Note 4 (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	28
Olive, Green, Not Pitted, in Saline, Nesoi (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	29
Olives Green Pitd/Stfd in Cntrs Lt 9 Kg Drd Wght (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	30
Olives Green Stuffed Place Packed Saline Nt >2700T (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	31
Olives Green Pitd/Stfd Place Packed Saline, Nesoi (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	32
Olives Not Green Chopped/Minced, Canned, in Saline (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	33
Olive Prep/Pres Othr Thn Saline Cntr < 9 Kg Frz (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	34
Olives Prep/Pres Except in Saline, Nt Froz, Nesoi (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	35
Olives Prep/Pres Except in Saline, Nt Froz, Nesoi (Kg)	0	0	0	0	0	0	0	0	0	0	0	0	49,532	18,332	0	0	36

Table 13 US Table Olive Average Unit Values (Import Prices US$/Kg) - Suppliers Average by Category

HS Commodity	Rank by Value 2002	Unit Values US$/Kg 1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	Average
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen													
2005702550 Olive Green Whole Stuffd Cntr Less Than 8Kg Saline (Kg)	1	3.2759	0.3749	2.8781	0.3263	3.0454	0.2766	3.5505	0.3096	3.3117	0.2937	2.7872	1.8573
2005706050 Olives Not Green, Sliced Canned In Saline Solution (Kg)	2	1.9579	0.6184	1.7986	0.6267	1.8567	0.3282	2.1315	0.3449	2.2958	0.4362	1.9108	1.3005
2005707500 Olives Not Green, Not Canned, In Saline, Nesoi (Kg)	3	2.2591	0.6504	1.8889	0.4445	1.7779	0.4265	2.1650	0.3364	2.2923	0.3869	2.3755	1.3641
2005700700 Other Vege, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	4	-	-	-	-	-	0.0000	2.6493	0.3180	2.8808	0.2301	3.3284	1.5678
2005702560 Olive Green Broken/Sliced/Salad Less Than 8Kg Saln (Kg)	5	2.2645	0.4635	2.1402	0.4792	2.2441	0.4264	2.4858	0.4151	2.4607	0.3729	2.1274	1.4436
2005700200 Olive, Green, Not Pitted, in Saline, Nesoi, Nt Frz (Kg)	6	-	-	-	-	-	0.0000	2.8506	0.2646	2.7729	0.3551	2.3512	1.4324
2005702520 Olive Green Whole Stuffed Ctr Over 8 Kg In Saline (Kg)	7	1.8166	0.5776	1.8623	0.4861	2.0791	0.5163	2.3094	0.4962	1.9647	0.7180	1.6112	1.3123
2005708020 Olives Nt Green Whole Pitted Canned Ov 2Kg Saline (Kg)	8	2.2615	0.8454	2.1083	0.4529	2.2300	0.3025	2.5534	0.3919	2.6820	0.3612	2.2075	1.4724
[illegible] Olives Grn Stfd Packed Saline Not Gt 2700T/Yr (Kg)	9	-	-	-	-	-	0.0000	6.4099	0.1792	8.3594	0.1593	5.0623	3.0253
[illegible] Olives, Green, Whole, Pitted, Cntr Ov 8 Kg, Saline (Kg)	10	2.1418	0.4277	2.1455	0.4296	2.9545	0.4525	2.8133	0.3767	2.3227	0.3263	2.2000	1.4619
[illegible] Olives Nt Green, Wedged or Broken Canned in Saline (Kg)	11	1.7440	0.4956	1.8040	0.4782	1.8497	0.3678	2.0016	0.6614	2.1132	0.3834	1.9226	1.2556
[illegible] Olive Green Whole Pitd Cntr Less Than 8 Kg Saline (Kg)	12	2.9520	0.3963	2.8310	0.3211	2.9195	0.3310	3.7920	0.2626	3.4375	0.2645	2.5855	1.8283
[illegible] Olive Nt Green Whole Pitted Canned Lt 3 Kg Saline (Kg)	13	2.4627	0.4693	2.3188	0.4342	2.3046	0.6552	2.6626	0.3482	2.7511	0.4547	2.1896	1.5501
2005702530 Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	14	1.3157	0.7240	1.4277	0.7886	1.4004	0.7392	1.5137	0.6568	1.5056	1.1268	1.1423	1.1218
2005707000 Olive Nt Green Nt Canned, Glass/ Metal Airtite Ctr (Kg)	15	2.9621	0.3362	2.4153	0.2782	2.5627	0.2062	2.8540	0.2672	3.2837	0.4004	3.3244	1.6991
2005708020 Olive Nt Green Nt Pittd, Canned Ov 2Kg, In Saline (Kg)	16	2.6811	0.3079	2.2314	0.7005	2.1133	0.2885	2.2317	0.3967	2.5968	0.4310	2.4604	1.4945
[illegible] Olive Grn Not Pttd In Saline Gt 8 Kg Addl Note 4 (Kg)	17	-	-	-	-	-	0.0000	1.9034	0.5507	1.6277	0.6116	1.5890	1.0471
2005709500 Olive Prep/Pres Othr Thn Saline Cntr Lt 10 Kg Etc (Kg)	18	-	-	-	-	-	0.0000	2.2524	0.6495	1.9734	0.2361	2.3506	1.2437
[illegible] Olives Green Pitd/Stfd Place Packed Saline, Nesoi (Kg)	19	-	-	-	-	-	0.0000	4.5493	0.2651	3.7095	0.3508	2.3132	1.8647
[illegible] Olives Grn Nt Pitd Cntr > 8 Kg Saline Nesoi (Kg)	20	-	-	-	-	-	0.0000	3.1206	0.2677	4.4443	0.5354	3.2817	1.9450
2005710460 Olive Green Not Pitd Ctr 8 Kg/Less, Saline, Nesoi (Kg)	21	-	-	-	-	-	0.0000	4.6920	0.4439	3.8664	0.2481	4.4165	2.2778
[illegible] Olives Green Pitd/Stfd in Cntrs Lt 8Kg Drd Wght (Kg)	22	-	-	-	-	-	0.0000	5.2958	0.3132	2.7240	0.2889	3.4254	2.0079
2005708060 Olives Not Green Chopped/Minced, Canned, In Saline (Kg)	23	2.7645	0.0820	2.6052	0.4184	4.1482	0.2698	2.9626	7.2901	2.9741	0.0534	1.3456	2.2649
2005709300 Olives Prep/Pres Except in Saline, Nt Frzn, Nesoi (Kg)	24	-	-	-	-	-	0.0000	3.3646	0.4350	3.7979	0.5275	3.8601	2.0009
[illegible] Olive Grn Nt Pttd Pipe Cntr Lt 8 In Sal Nesoi Nt Fz (Kg)	25	-	-	-	-	-	0.0000	2.4077	1.1311	3.7386	0.3465	5.1054	2.1316
[illegible] Olive Nt Green Nt Pittd Canned Nt Ov 3 Kg Saline (Kg)	26	1.9352	1.1033	1.8497	0.7037	2.8147	0.7013	2.8086	0.2216	2.8742	0.3102	2.2560	1.5798
[illegible] Olive Grn Nt Pttd Ctr 8 Kg/Less Saline Nt Gt 730Mt (Kg)	27	-	-	-	-	-	0.0000	2.8137	0.4897	3.4682	0.2229	3.5151	1.7518
[illegible] Olive Grn Nt Pttd Pipe Cntr Gt 8 In Saln Nt Ov 730T (Kg)	28	-	-	-	-	-	0.0000	1.6587	4.9378	2.7161	1.6189	1.6967	2.0994
[illegible] Olive Grn Nt Pttd Pipe Cntr > 8 In Saline Nt >720T (Kg)	29	1.8039	0.6395	1.4937	1.8377	2.3071	-	-	-	-	-	-	1.6164
[illegible] Olive Grn Nt Pttd Ctr 8 Kg/Less, Saline Nt >730 Mt (Kg)	30	2.2725	1.0536	1.9723	0.3474	1.0456	-	-	-	-	-	-	1.3383
[illegible] Olive Green Nt Pttd in Saline Nesoi, Per Us Note 4 (Kg)	31	1.4956	0.7419	1.4957	0.4971	1.4189	-	-	-	-	-	-	1.1299
[illegible] Olive, Green, Not Pitted, In Saline, Nesoi (Kg)	32	2.1554	0.5408	2.0902	0.4221	2.3703	-	-	-	-	-	-	1.5158
[illegible] Olives Green Stuffed Place Packed Saline Nt >2700T (Kg)	33	6.3046	0.1853	5.7405	0.1512	5.9206	-	-	-	-	-	-	3.6604
2005702200 Olives Green Pitd/Stfd Place Packed Saline, Nesoi (Kg)	34	3.1989	0.3929	3.6143	0.2772	3.7555	-	-	-	-	-	-	2.2478
2005709100 Olive Prep/Pres Otrws Thn Saline Cntr < 10 Kg Etc (Kg)	35	2.0608	0.5057	1.9863	0.4679	2.0009	-	-	-	-	-	-	1.4043
2005708300 Olives Prep/Pres Except in Saline, Nt Frzn, Nesoi (Kg)	36	2.6612	0.5608	2.6740	0.3526	2.5842	-	-	-	-	-	-	1.7665

Table 14 US Table Olive Average Unit Values (Import Prices US$/Kg) - Spain Average by Category

HS Commodity	Rank by Value 2002	Unit Values US$/Kg 1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	Average
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen													
2005702550 Olive Green Whole Stuffd Cntr Less Than 8Kg Salne (Kg)	1	3.2697	0.3782	2.8828	0.3236	3.0576	0.2753	3.5626	0.3082	3.3207	0.2931	2.7974	1.8608
2005706080 Olives Nsr Green, Sliced Canned In Saline Solution (Kg)	2	2.0065	0.5604	1.7985	0.6537	1.6588	0.4159	2.1724	0.3295	2.2784	0.5036	1.8971	1.3158
2005702560 Olive Green Broken/Sliced/Salad Less Than 8Kg Saln (Kg)	3	2.3242	0.4526	2.1537	0.4675	2.2837	0.4294	2.5744	0.4045	2.4723	0.3781	2.1907	1.4865
2005702520 Olive Green Whole Stuffed Ctr Over 8 Kg, in Saline (Kg)	4	1.8088	0.5938	1.8722	0.4803	2.1130	0.5217	2.3919	0.4611	1.9851	0.7163	1.6195	1.3240
2005706020 Olives Nt Green Whole Pitted Canned Ov 2Kg Saline (Kg)	5	2.3485	0.5909	2.0956	0.4387	2.2437	0.3837	2.5898	0.4421	2.5658	0.3124	2.2098	1.4746
2005702020 Olives Grn Stffd Packed Saline Nsl Gr 2700T/Yr (Kg)	6	-	-	-	-	-	0.0000	6.5184	0.1753	6.4087	0.1591	5.1184	3.0633
2005702510 Olives, Green, Whole, Pitted, Cntr Ov 8 Kg, Saline (Kg)	7	2.4028	0.3964	2.5793	0.3760	2.8547	0.3815	3.7353	0.2964	2.6797	0.2401	2.4752	1.6743
2005702030 Olive, Green, Not Pitted, in Saline, Nesoi, Nt Frz (Kg)	8	-	-	-	-	-	0.0000	3.2900	0.2787	2.6100	0.4579	2.1676	1.4674
2005702540 Olive Green Whole Pitd Cntr Less Than 8 Kg Saline (Kg)	9	2.9842	0.4024	2.8807	0.3448	2.9686	0.3158	3.8708	0.2787	3.5348	0.2545	2.7415	1.8706
2005706030 Olive Nt Green Whole Pitted Canned Lt 3 Kg Saline (Kg)	10	2.5618	0.5592	2.3311	0.4639	2.3602	0.5062	2.6328	0.3223	2.7631	0.5628	2.2274	1.5736
2005702530 Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	11	1.3144	0.6903	1.4317	0.9154	1.4218	0.7317	1.5245	0.6361	1.5081	1.2306	1.1483	1.1412
2005706070 Olives Nt Green, Wedged or Broken Canned in Saline (Kg)	12	2.0424	0.3309	1.8949	0.6622	2.0212	0.2366	2.1003	1.7042	2.2833	0.1992	1.9983	1.4067
2005706030 Olive Nt Green Nt Pitd, Canned Ov 2Kg, in Saline (Kg)	13	1.7007	0.2166	1.7756	0.7052	1.9306	0.1779	2.2661	0.9481	2.2837	0.2901	2.1614	1.3142
2005706050 Olives Grn Nt Pitd Cntr < 8 Kg Saline Nesoi (Kg)	14	-	-	-	-	-	0.0000	3.9579	0.1607	3.6719	0.7208	2.6866	1.8863
2005701600 Olives Green Prsd/Brnd in Conts Lt 1Kg Drd Wght (Kg)	15	-	-	-	-	-	0.0000	5.6527	0.2642	2.6929	0.5318	3.8330	2.1958
2005706080 Olives Nsr Green Chopped/Minced, Canned, in Saline (Kg)	16	2.1097	0.0359	2.1716	-	-	0.0000	2.1583	-	-	0.0000	1.3458	1.1173
2005709700 Other Vegs, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	17	-	-	-	-	-	0.0000	2.4084	0.3802	2.3380	-	-	1.2818
2005707500 Olives Nsr Green, Not Canned, in Saline, Nesoi (Kg)	18	2.4450	0.4369	1.8468	0.5177	1.2297	8.8244	2.4265	0.0183	2.2257	0.2821	2.0735	2.0353
2005707000 Olive Nt Green Nt Canned, Glass/ Metal Airtite Ctr (Kg)	19	2.5913	0.5329	1.7429	0.1377	2.1401	0.1183	2.3150	0.5478	2.3069	0.6748	2.1459	1.3312
2005702050 Olive Grn Not Pitd in Saline Gt 8 Kg Addtl Note 4 (Kg)	20	-	-	-	-	-	0.0000	2.0462	0.6046	1.6534	0.8841	1.3173	1.0843
2005702300 Olives Green Prsd/Brnd Place Packed Saline, Nesoi (Kg)	21	-	-	-	-	-	0.0000	4.6508	0.2602	4.3563	0.3444	2.7511	2.0605
2005705000 Olive Prep/Pres Othr Thn Saline Cntr Lt 10 Kg Drn (Kg)	22	-	-	-	-	-	0.0000	2.5229	10.4262	2.3635	0.3060	5.3634	3.4970
2005702400 Olive Green Not Pitd Ctr 8 Kg/Less, Saline, Nesoi (Kg)	23	-	-	-	-	-	0.0000	3.6818	0.3076	3.1180	1.0336	3.1241	1.6775
2005706060 Olive Nt Green Nt Pitd Canned Nt Ov 3 Kg, Saline (Kg)	24	1.9119	1.2475	1.7802	1.1069	1.9143	0.7901	2.5579	2.4779	3.9897	0.0168	1.9596	1.7956
2005702430 Olive Grn Nt Ptd Pkge Cntr Lt 8 in Sal Nesoi Nt Fz (Kg)	25	-	-	-	-	-		-	0.0000	2.5564	-	-	1.2782
2005709300 Olives Prep/Pres Except in Saline, Nt Frzn, Nesoi (Kg)	26	-	-	-	-	-	0.0000	2.3921	-	-	-	-	1.1961
2005702200 Olive Grn Nt Pitd Ctr 8 Kg/Less Saline Nt Gt 730Mt (Kg)	27	-	-	-	-	-	0.0000	3.6258	0.7348	2.7960	-	-	1.7891
2005702210 Olive Grn Nt Ptd Pkge Cntr Gt 8 in Saln Nt Ov 730T (Kg)	28	-	-	-	-	-	-	-	0.0000	4.5744	-	-	2.2872
2005702030 Olive Grn Nt Ptd Pkge Cntr < 8 in Saline Nt > 730T (Kg)	29	-	-	-	-	-	-	-	-	-	-	-	
2005702060 Olive Grn Nt Pitd Ctr 8 Kg/Less, Saline Nt > 730 Mt (Kg)	30	2.3102	1.2817	2.2424	3.2961	0.5377	-	-	-	-	-	-	1.9336
2005702050 Olive Green Nt Pitd in Saline Nesoi, Pkt Us Note 4 (Kg)	31	1.5203	0.8539	1.7170	0.5266	1.5595	-	-	-	-	-	-	1.2355
2005702500 Olive, Green, Not Pitted, in Saline, Nesoi (Kg)	32	2.3579	0.5227	2.5353	0.3442	2.5753	-	-	-	-	-	-	1.6731
2005702100 Olives Green Stuffed Place Packed Saline Nt > 2700T (Kg)	33	6.2985	0.1859	5.7172	0.1513	5.9239	-	-	-	-	-	-	3.6529
2005702200 Olives Green Prsd/Brnd Place Packed Saline, Nesoi (Kg)	34	3.2427	0.3738	3.6330	0.2887	4.0133	-	-	-	-	-	-	2.3003
2005705000 Olive Prep/Pres Othrwse Thn Saline Cntr < 10 Kg Drn (Kg)	35	5.1845	0.0725	2.1722	0.0858	2.3165	-	-	-	-	-	-	1.9683
2005709300 Olives Prep/Pres Except in Saline, Nt Frzn, Nesoi (Kg)	36	1.9916	34.9621	3.1644	0.0024	2.1309	-	-	-	-	-	-	8.4503

ALEB BDS/MIS.

Table 15 Table Olive Average Unit Values (Import Prices US$/Kg) - Greece Average by Category

HS Commodity	Rank by Value 2002	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	Average
		Unit Values US$/Kg											
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen													
2005707500 Olives Not Green, Not Canned, In Saline, Nesoi (Kg)	1	2.5236	0.5624	1.9048	0.4381	1.7719	0.4198	2.2199	0.3422	2.3370	0.4142	2.7698	1.4276
2005709700 Other Vege, Otherwise Prep/Pres, Not Frozen, Nesoi (Kg)	2	-	-	-	-	-	0.0000	2.8693	0.2898	3.0621	0.2029	3.8668	1.7150
2005700000 Olive, Green, Not Pitted, In Saline, Nesoi, Nt Frz (Kg)	3	-	-	-	-	-	0.0000	1.6394	0.3248	2.3143	0.4545	2.7448	1.2463
2005707000 Olive Nt Green Nt Canned, Glass/ Metal Airtite Ctr (Kg)	4	2.3988	0.2014	2.2560	0.3598	2.3109	0.2249	2.4824	0.3567	3.5259	0.2358	3.9001	1.6593
2005700600 Olive Prep/Pres Othr Thn Saline Cntr Lt 8 Kg Etc (Kg)	5	-	-	-	-	-	0.0000	2.0399	1.2146	1.5034	0.2416	2.3021	1.2169
2005702500 Olives, Green, Whole, Pitted, Cntr Ov 8 Kg, Saline (Kg)	6	1.6923	0.1343	1.4077	0.2613	2.3134	0.1227	2.1796	0.3634	2.6560	0.3080	3.1909	1.3573
2005702520 Olive Green Whole Stuffed Ctr Over 8 Kg, In Saline (Kg)	7	4.4322	-	-	0.0000	2.2727	0.1866	4.9400	0.1625	7.3066	0.0698	4.2383	2.6215
2005700600 Olive Grn Not Pttd in Saline Ct 8 Kg Addl Note 4 (Kg)	8	-	-	-	-	-	0.0000	1.8032	0.5778	1.7437	0.4338	2.2674	1.1410
2005702500 Olive Green Whole Stuffd Cntr Less Than 8Kg Saline (Kg)	9	5.7920	0.1422	3.0464	-	-	0.0000	7.9451	0.0316	6.8176	0.1037	6.2437	3.3247
2005702540 Olive Green Whole Pttd Cntr Less Than 8 Kg Saline (Kg)	10	1.5728	-	-	0.0000	4.3000	0.0093	3.0900	1.5396	4.5250	0.0397	1.2839	1.8178
2005700600 Olives Grn Nt Pttd Cntr < 8 Kg Saline Nesoi (Kg)	11	-	-	-	-	-	0.0000	1.7903	0.3019	14.5595	-	-	4.1629
2005702530 Olive Green Broken/Sliced/Salad Cntr Ov 8Kg Saline (Kg)	12	1.3906	4.5895	1.4613	1.1931	1.3421	0.1115	1.6341	0.3745	2.3006	0.9078	1.4610	1.5242
2005705030 Olive Nt Green Nt Pittd, Canned Ov .3Kg, in Saline (Kg)	13	2.9658	0.3158	2.1878	0.5648	2.0203	0.4136	2.1214	0.5714	2.3280	0.7155	2.8643	1.5508
2005700430 Olive Grn Nt Ptd Ripe Cntr Lt 8 in Sal Nesoi Nt Fz (Kg)	14	-	-	-	-	-	-	-	0.0000	5.4923	-	-	2.7462
2005700410 Olive Green Not Pttd Ctr 8 Kg/Less, Saline, Nesoi (Kg)	15	-	-	-	-	-	0.0000	2.8624	0.1993	4.5650	0.1639	6.1767	2.3279
2005702560 Olive Green Broken/Sliced/Salad Less Than 8Kg Saln (Kg)	16	1.5200	0.1490	1.6238	0.1736	1.3106	0.7612	1.4170	0.2944	1.6821	0.3189	1.5535	0.9822
2005709300 Olives Prep/Pres Except In Saline, Nt Frzn, Nesoi (Kg)	17	-	-	-	-	-	0.0000	3.6212	1.5993	2.8034	0.2327	4.0819	2.0547
2005702600 Olives Green Pitt/Stfd in Cntrs Lt Kg Ord Mgnt (Kg)	18	-	-	-	-	-	-	-	-	-	0.0000	7.9899	3.9950
2005700620 Olives Grn [illegible] (Kg)	19	-	-	-	-	-	0.0000	2.6046	0.6584	4.6345	0.1316	4.7710	2.1333
2005700025 Olives Nt Green Whole Pttd Canned Ov .3Kg Saline (Kg)	20	3.7800	0.0568	2.4602	0.7909	2.2720	0.2127	2.7338	0.2678	3.3215	0.7149	4.0962	1.9825
2005702300 Olives Green Pitt/Stfd Place Packed Saline, Nesoi (Kg)	21	-	-	-	-	-	0.0000	4.2476	-	-	0.0000	4.6520	2.2249
[illegible]	22	-	-	-	-	-	0.0000	1.6191	16.5239	7.1829	0.0956	1.8667	4.5147
[illegible]	23	-	-	-	-	-	0.0000	1.8275	2.0219	4.9793	-	-	2.2073
[illegible]	24	-	-	-	0.0000	1.7600	-	-	-	-	-	-	0.8800
[illegible]	25	1.6200	-	-	-	-	-	-	-	-	-	-	1.6200
[illegible]	26	1.4149	0.6093	1.2830	0.7001	1.4322	-	-	-	-	-	-	1.0879
2005705000 Olive, Green, Not Pitted, In Saline, Nesoi (Kg)	27	1.8983	1.1215	1.4859	0.7666	1.5036	-	-	-	-	-	-	1.3551
2005702100 Olives Green Stuffed Place Packed Saline [illegible] (Kg)	28	9.5928	-	-	-	-	-	-	-	-	-	-	9.5928
2005702200 Olives Green Pitt/Stfd Place Packed Saline, Nesoi (Kg)	29	1.3642	0.3614	2.3602	0.3500	1.5607	-	-	-	-	-	-	1.1593
2005705060 Olive Nt Green Nt Pttd Canned Nt Ov .3 Kg, Saline (Kg)	30	-	0.0000	1.8443	0.9903	2.1491	-	-	0.0000	2.1489	-	-	1.1888
2005706030 Olive Nt Green Whole Pitted Canned Lt .3 Kg Saline (Kg)	31	-	-	-	0.0000	1.9679	0.9465	4.6580	1.6533	56.5333	0.0014	6.1323	8.9866
2005706050 Olives Not Green, Sliced Canned In Saline Solution (Kg)	32	-	-	-	-	-	0.0000	1.8243	0.8065	2.0067	1.8093	3.8906	1.7232
2005706060 Olives Not Green Chopped/Minced, Canned, In Saline (Kg)	33	2.6720	0.2247	6.4944	0.0472	5.7771	0.3292	6.1415	-	-	-	-	2.9552
2005706070 Olives Nt Green, Wedged or Broken Canned In Saline (Kg)	34	-	-	-	0.0000	2.2766	0.2240	5.0000	-	-	0.0000	2.3590	1.6433
2005700100 Olive Prep/Pres Otherwise Thn Saline Cntr < 13 Kg Etc (Kg)	35	1.5674	0.5605	1.9309	0.6108	1.5791	-	-	-	-	-	-	1.2497
2005700300 Olives Prep/Pres Except In Saline, Nt Frzn, Nesoi (Kg)	36	3.1279	0.4289	2.6884	0.4133	2.6868	-	-	-	-	-	-	1.8688

Table 16 Table Olive Average Unit Values (Import Prices US$/Kg) - Morocco Average by Category

Time / Item / HS Commodity	Rank by Value 2002	Unit Values US$/Kg 1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	Average
200570 Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen													
[illegible]	1	1.8017	1.3315	1.8360	0.5111	1.8404	0.1314	2.0975	0.3935	2.3186	0.2098	1.9372	1.3172
[illegible]	2	1.5825	0.7087	1.7089	0.3575	1.7659	0.4820	1.9041	0.4239	2.0754	0.4850	1.9009	1.2177
[illegible]	3	1.1925	2.4169	1.2289	0.5314	1.2114	0.5900	1.4539	0.3102	2.1689	0.3756	1.2067	1.1602
[illegible]	4	1.7218	1.0437	1.9106	0.3864	1.8189	0.5255	1.9618	0.4263	2.3213	0.3398	1.7564	1.2884
[illegible]	5	-	-	-	-	-	0.0000	1.4665	0.1962	2.2515	0.0647	1.1631	2.3570
[illegible]	6	-	-	-	-	-	0.0000	1.2257	0.7669	1.5972	0.4494	1.3976	0.9045
[illegible]	7	1.7819	2.4704	1.9253	0.4304	2.0798	0.0679	2.2966	0.3645	2.6805	0.5355	1.9761	1.5081
[illegible]	8	-	0.0000	1.4300	0.3329	1.4019	1.1905	1.8000	0.1180	1.9186	15.9606	3.6300	2.7792
[illegible]	9	-	-	-	-	-	0.0000	1.3600	-	-	-	-	0.6800
[illegible]	10	1.5180	0.3978	1.5749	5.4667	1.5999	0.0661	1.7364	0.5177	2.0438	0.4928	1.6145	1.5483
[illegible]	11	1.1763	0.9798	1.0466	0.3480	1.2969	0.4959	1.3736	0.6116	1.4452	1.5549	1.1615	1.0446
[illegible]	12	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	13	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	14	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	15	-	-	-	-	-	-	-	0.0000	2.0412	-	-	1.0206
[illegible]	16	-	-	-	-	-	0.0000	0.8939	0.0872	1.2140	2.2731	1.0374	0.9176
[illegible]	17	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	18	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	19	0.9066	-	-	0.0000	1.1974	-	-	-	-	-	-	0.7010
[illegible]	20	1.1420	0.1089	1.0487	0.6369	1.2325	-	-	-	-	-	-	0.8340
[illegible]	21	-	-	-	-	-	-	-	-	-	0.0000	2.2532	1.1266
[illegible]	22	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	23	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	24	-	-	-	0.0000	1.2893	-	-	-	-	-	-	0.6446
[illegible]	25	-	-	-	-	-	0.0000	2.0037	-	-	-	-	1.0018
[illegible]	26	1.3500	0.0316	1.4882	0.3643	1.5029	0.3474	1.4302	1.9182	1.2996	0.5951	1.3121	1.0963
[illegible]	27	1.2062	2.1742	1.3998	0.1656	1.5409	0.3405	1.5999	0.9936	1.1626	0.6044	1.0154	1.1052
[illegible]	28	-	0.0000	1.2371	0.1721	1.6251	0.4414	2.0142	0.8622	1.7112	0.7257	0.9777	0.9767
[illegible]	29	1.8643	-	-	-	-	0.0000	1.6364	-	-	0.0000	1.8899	1.1181
[illegible]	30	1.8951	0.4052	2.0223	0.5067	1.9546	2.7744	2.3376	0.3061	2.5858	0.1455	2.0635	1.5452
[illegible]	31	-	-	-	-	-	-	-	-	-	-	-	
[illegible]	32	-	-	-	0.0000	2.2630	0.6265	2.3131	0.0601	2.4481	1.0543	1.6536	1.3011
[illegible]	33	1.3677	1.9606	1.6546	0.2905	1.3590	-	-	-	-	-	-	1.3261
[illegible]	34	1.2631	4.4719	1.1039	0.7150	1.2564	-	-	-	-	-	-	1.7620
[illegible]	35	-	-	-	-	-	0.0000	1.8087	0.0471	1.7880	0.3540	1.5151	0.9190
[illegible]	36	-	-	-	-	-	0.0000	1.5313	-	-	-	-	0.7656

The Competitive Intelligence Analysis

Although there has been an increase in olive production (and consumption) around the world, production is still highly concentrated in the Mediterranean region. The region is responsible for more than 95 percent of world production and 90 percent of total consumption. The crop generates regional employment and is an important source of income in rural areas, thereby reducing migration to urban areas. It also provides ecological benefits by contributing to soil retention and reducing erosion. Traditionally, olive cultivation has been practised by small family-owned holdings on non-irrigated land, using inefficient cultivation practices. This has resulted in low yields. However, in recent years governments, the EU and the IOOC have taken measures to modernise the industry

This section briefly introduces a description of the competitive position of the main olive producing countries. The section pays particular attention to the levels of production, trade and government assistance of the countries examined and the impact on Egyptian potential.

Spain

Olive Production

According to recent estimates, Spain has at least 180 million trees planted on 2 250 000 hectares. In 1997 Spain produced a record harvest of 4 081 500 tonnes of olives. Table olive production for the crop year 1996 – 97 reached a record level of more than 244 000 tonnes.

Figure 24 Spain Map and Olive Production Areas

There is a disagreement on the number of trees planted. The European Commission figure is 180 million, while the Spanish Ministry of Agriculture indicates that there are 215 million and the Spanish olive sector has estimated that there are as many as 250 million. If proposed changes to the CMO are accepted, such variation in the estimates may cause disharmony among the interested stakeholders.

In the south of the country is the centre of Spanish olive production, with 60 percent of groves and accounting for 80 percent of total Spanish olive production. Within Andalucia, the provinces of Jaén and Cordoba alone account for 40 percent and 20 percent respectively of Spain's production. Other important regions are Castilla-La Mancha, Extremadura and Cataluá (Tardaquila).

Figure 25 Spain Area Planted with Olives

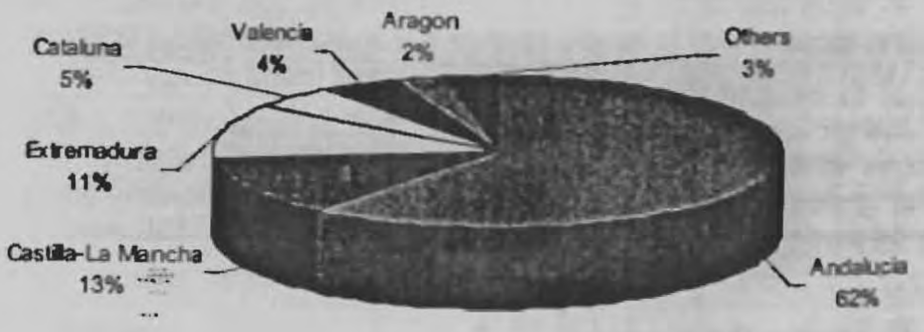


Figure 26 Spain Olive production and Trend, 1961 – 2002

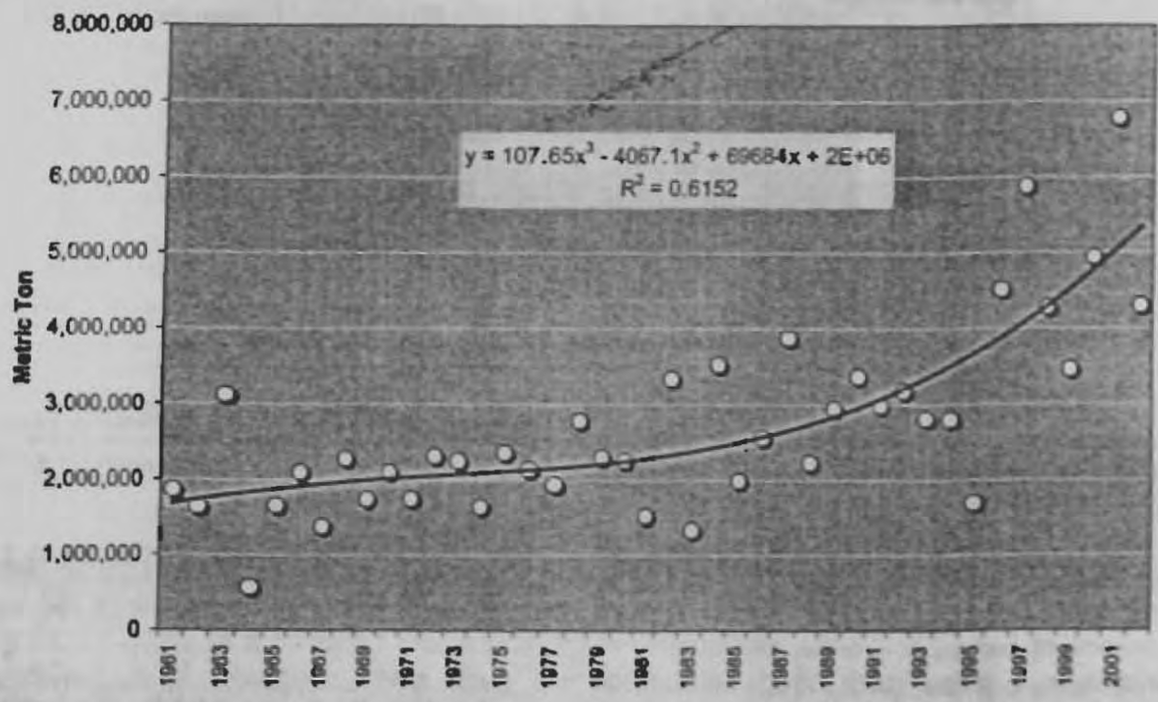


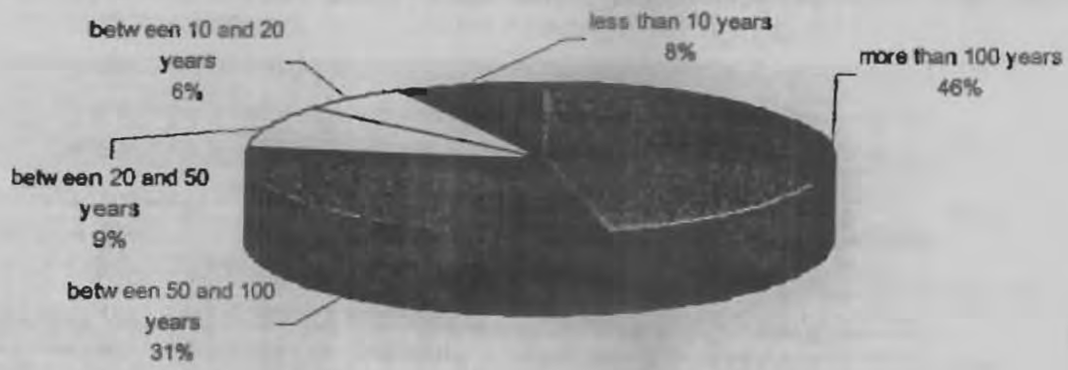
Table 17 The Spanish Olive Industry (hectares)

Condition	For Olive Oil	For Table Olives	Total
Producing	1 966 186	128 240	2 094 426
No yet producing	81 160	1 747	82 907
Total	*2 047 346*	*129 987*	*2 177 333*
Non-irrigated	1 917 147	109 459	2 026 606
Irrigated	130 199	20 528	150 727
Source: MAPA 1996			

The importance of the olive sector in Spain is such that around 300 towns rely principally on olive production, the industry providing approximately 46 million days of work (Lpez 1997). In Andalucia, olive production represents 30 percent of total agricultural output and in Jaén it represents 80 percent. In some Andalucian cities, particularly Jaén, the economy relies mainly on olive and olive production. This intense regional specialisation in olive production helps explain the demonstrations against changes to the CMO (Castillo-Quero).

Crop production in Spain is fragmented and characterised by the existence of a considerable number of small to medium-size enterprises and by few larger firms. Approximately 90 percent of all olive groves are family holdings of less that 30 hectares, the average size being only 3.8 hectares (Castillo-Quero 1997). Intensive plantations comprise about 2.5 to 3 percent of total groves. Only 10 percent of existing olive groves are on irrigated land. Approximately 46 percent of the Spanish olive groves are more than 100 years of age.

Figure 27 Spain - Age of Olive Groves



Olive growing in Spain has changed significantly in the past three decades. In 1962, 2.42 million hectares were dedicated to olive growing; in 1985, the area had declined to 2.08 million hectares and in 1996 it had risen again to 2.17 million hectares.

The decline in the area planted during the 1970s and 1980s can be attributed to the policies of ordering and reconversion aimed at farm improvement, which in some cases led to the clearance of old olive groves, particularly in Andalucia and Castilla-La Mancha. During the 1990s new groves have been established on good quality irrigated land, resulting in increases in efficiency and, consequently, in production (Castillo-Quero 1997). According to the latest figures, during the 1990s around 173 000 hectares were planted, mainly in the Andalucian region.

Table 18 Spain - New Areas Planted, 1990 – 1996.

Region	Area (ha)	%
Andalucy	128 116	74.0
Castilla-La Mancha	24 857	14.4
Extremadura	9 678	5.6
Valenciana	6 474	3.7
Aragn	1 599	0.9
Regin de Murcia	1 151	0.7
Navarra	909	0.5
Madrid	242	0.1
Baleares	70	0.04
Total	173 096	100.0
Source: Lopez-Villalta 1997		

According to official figures, the tree density in olive groves is an average of 99 trees/hectare. Navarra (150), La Rioja (150), Basque country (150) and Andaluc,ja (105) have the highest density levels. There are also approximately 100 000 hectares with more than 200 trees/ha (Lopez-Villalta 1997). Although olives are planted mainly in non-irrigated areas, the number of irrigated groves has increased from 100 000 in 1985 to 150 000 in 1994, and is likely to continue to rise.

Table 19 Number of Trees and Tree Density of Spanish Olive Groves

Province	No. of trees (million)	Density
Andalucia	138.7	105
Castilla-La Mancha	26.6	96
Extremadura	23.6	94
Calaluä	10.6	91
Valencia	7.3	77
Aragon	3.6	64
Madrid	1.9	86
Murcia	1.1	52
Baleares	0.7	64
Castillo y Leon	0.6	60
La Rioja	0.3	150
Navarra	0.3	150
The Basque Country	0.01	150
Total	215.31	99
Source: MAPA 1996		

Figure 28 Spain Olive Area Planted, Production, and Yield, 1980 – 2002.

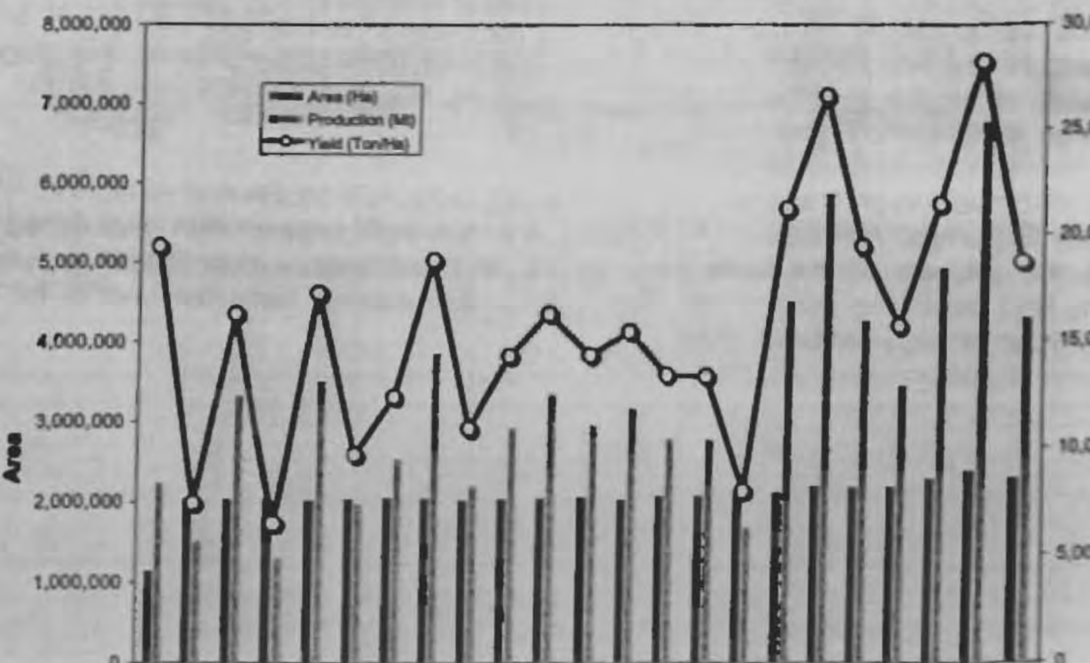


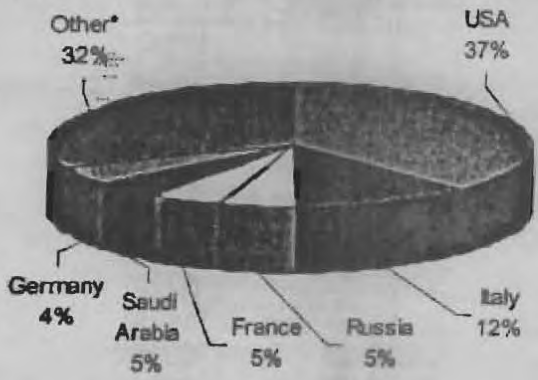
Table olive production has been relative stable at around 230 000 tonnes per year. Recent data showed increasing productivity of olives in Spain (Figure 28)

Trade

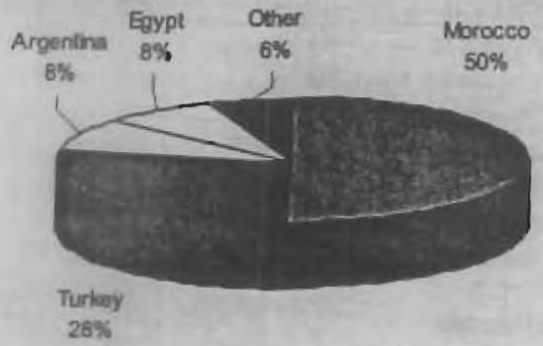
In 2002, approximately 130 000 tonnes of table olives were exported, the main markets being the United States (37%) and Italy (12%). Less that 1 900 tonnes of table olives were imported, the major suppliers being Morocco (50%), Turkey (28%) and Argentina. (8%).

Figure 29 Spain Olive Trade

Spain Exports of Table Olives



Spain Imports of Table Olives



* less than 7 500 tonnes

The Industry

Spain is the leader in the production and export of table olives, particularly of green table olives. The sector provides more than 10 000 jobs, contributing 27 percent of total employment in the canned and prepared food products industry (de Mora). Per capita consumption of table olives has fallen from 3.04 kg in 1993 to 2.77 kg in 1997, a phenomenon attributed to higher prices.

There are also two non-profit associations of olive exporters, ASEMESA and ASOLIVA. The Table Olive Exporters' Association, ASEMESA, is a non-profit organization established to represent the interest of the table olive sector and implements coordinated growing, processing and marketing policies (de Mora 1995). It represents firms responsible for 80 percent of Spanish exported table olives

Figure 30 The Spanish table olive sector in figures

STATISTICS AND MARKETS

The Spanish table olive sector in figures

The world production of table olives amounts to about one million metric tonnes, of which approximately 30 percent corresponds to Spain. As to this Spanish production, green olives represent 75 percent and olives of black or turning color represent the remaining 25 percent. Half of the production is destined for national consumption, and the other half is exported to over one hundred countries. Most of the exported olives - 75 percent - are sold packed in jars, tins or bags, and the remaining part is sold in bulk.

Main markets for the Spanish table olive

Spain is the world's number one producer and exporter of table olives, a position obtained attributed to the efforts and professionalism of a sector combining tradition and a supreme quality of olive with the technological advances of a modern industry.

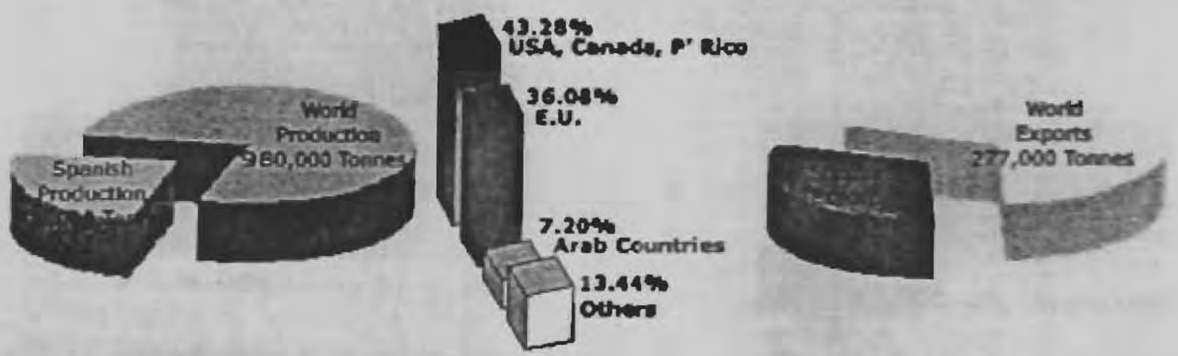


Figure 31 The Spanish table olive sector: production process

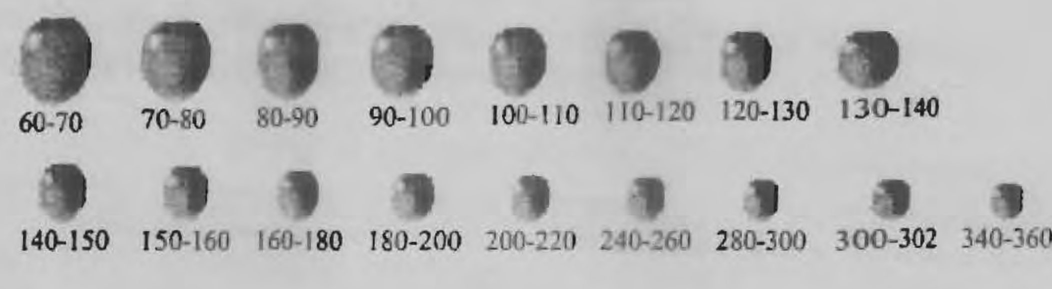
PRODUCTION PROCESS

By hand, one by one, the fruit is harvested and placed into an 'esparto' basket hanging from the necks of the countrymen, the "macaco". After careful growing, the harvest is held in September and October, when the fruit reaches its full size and before its color changes.

The processing of table olives in Spain results from the combination of tradition with modern technology, in order to obtain an outstanding product, appreciated all over the world.

Quality, selection, meticulous processing, everything is subject to strict controls. Only perfect olives will leave the conveyor belt to be packaged and sold. The contribution of investigators and technicians has resulted in an extremely technologically advanced sector, constantly evolving, and capable of offering products of the highest quality, appreciated throughout the world.

Olive Size



Olive size depends on the amount of fruit that the olive tree produces each year if the tree is 'loaded'. By distributing its sap among a greater number of olives, they will be smaller and therefore, the number of small sized olives will be higher. The opposite happens in years with a lower yield. The alternation in the harvest, or "veceria" has now been reduced by the great increase of olive grove plantations with irrigation, especially utilizing drip irrigation.

Figure 32 The Spanish table olive sector: types of olives and main forms of presentation

Changing color: Obtained from rose, wine-rose or brown colored fruits, harvested before the stage of complete ripeness is attained.

Green: These are obtained from fruits harvested during the ripening period, prior to coloring and when they have reached normal size.

Black: Obtained from fruit, which when not fully ripe, have been darkened by oxidation.

MAIN FORMS OF PRESENTATION

The Spanish Olive Industry has shown to work in a very dynamic way, not only by exporting to many different countries, but by a wide variety in its packaging.

Whole

These olives keep their original shape. They haven't been pitted.

Pitted

They have already been pitted, the stone has been removed, and they keep their original shape.

Stuffed

They have been pitted, and stuffed with one or more fillings, such as: peppers, onions, almonds, anchovies, hazelnut, tuna, salmon etc.

Salads

These are broken and pitted olives, with or without capers, as well as being stuffed.

With Capers

Whole or pitted, usually small in size, with capers and with or without peppers.

Sliced

Pitted or stuffed olives sliced in segments of fairly uniform thickness.

outnumber the other products.

Thrown Packed

When the olives are not placed in the jar in any particular order.

Place Packed

When the olives are placed in the jar in an orderly symmetrical fashion or forming geometrical shapes.

Recent Developments

Multinational companies have acquired a significant share of the Spanish market. Aceites Espaóles (Carbonell and Elosua) controls 28 percent of the Australian market; Feruzzi (Salgado and Koipe) has 14 percent; Unilever (Lince, La Masia, Lindolive) 8.5 percent and Uteco-Jaén 7.9 percent (Parras-Rosa 1997).

Greece

Olive Production

In 2002 there were approximately 765 000 hectares under olive groves, the majority being small, family-owned enterprises. In 1993 there were fewer than 136.7 million olive trees (National Statistics Service of Greece 1996). In 1997 Greece produced 1 600 000 tonnes of olives, of which more than 95 percent was destined for olive production.

Yields obtained for table olive production are about 0.456 tonnes/ha, well below EU standards, but the average yield of 2.948 tonnes of olives per hectare for the production of olive (EC 1998) is the highest in the EU.

Olive farming is considered so important in Greece that more than half of the farms are involved in the cultivation of olive trees. Central Greece and Evia are the major centres for table olives.

Figure 33 Greece Olive Production and Projections, 1961 – 2002

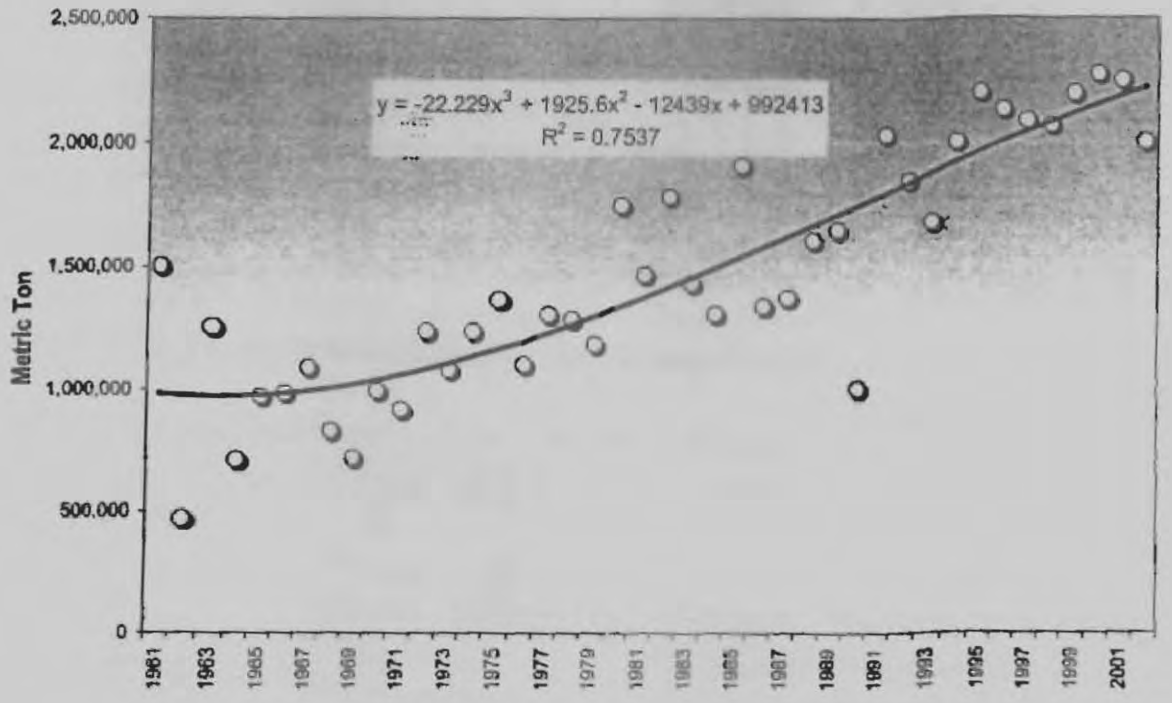
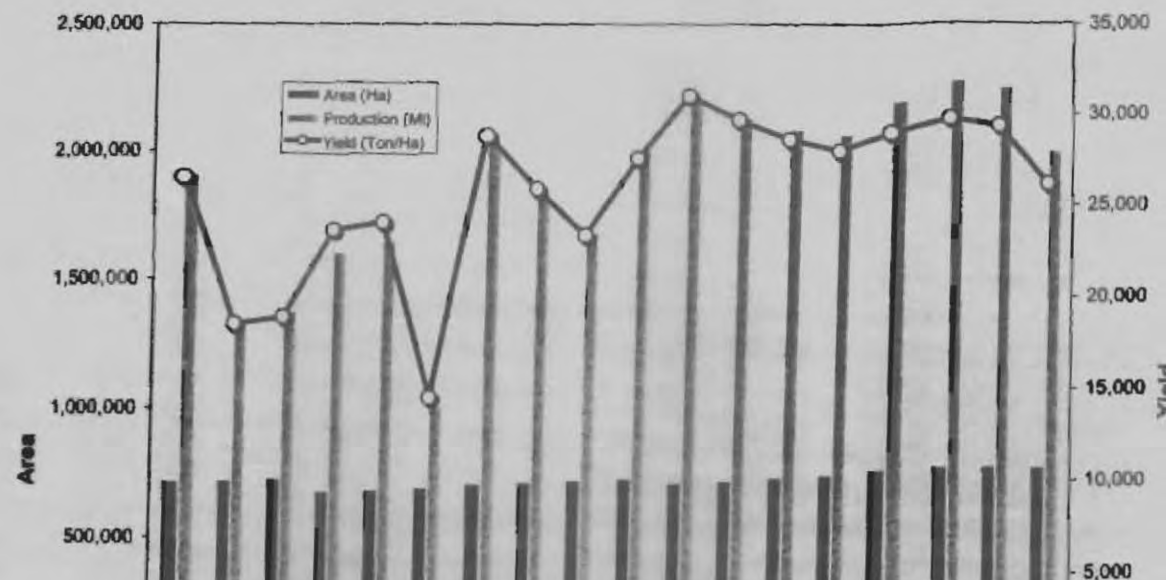


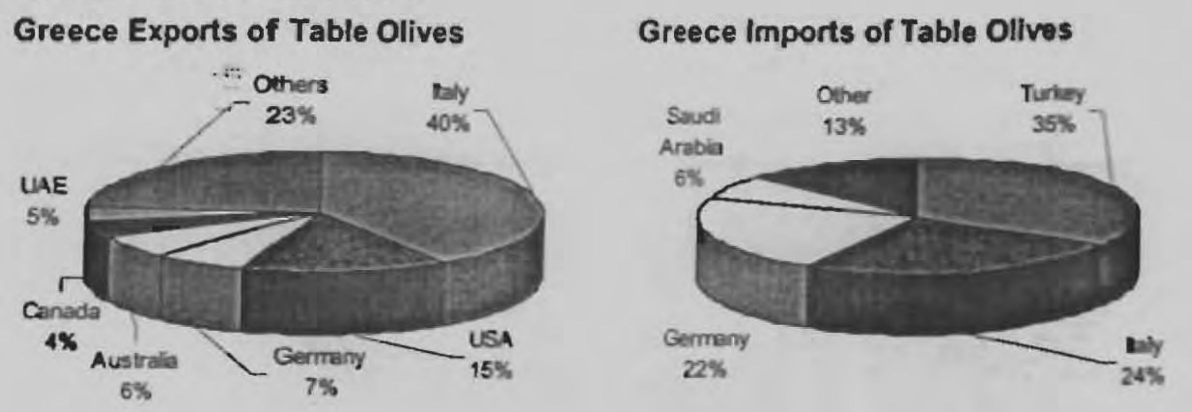
Figure 34 Greece Olives: Area Yield, and Production, 1980 – 2002



Trade

Greece is big net exporter of table olives, exporting more than 55 000 tonnes and importing less than 500 tonnes in 2002. The main markets for Greek table olives are Italy (40%), the United States (15%) and to a lesser extent Germany, Australia, the United Arab Emirates (U.A.E.) and Canada. Imported table olives are sourced mainly from Turkey (35%) and Italy (24%).

Figure 35 Greece Olive Trade



The Industry

The Hellenic Foreign Trade Board, a quasi-government organization, is responsible for the marketing and promotion of olive products. It has a program that focuses on packaging and promotion, targeting the United States, Australian and United Kingdom markets. Its objective is to increase market share in these countries.

Developments

Greek producers believe that the proposed CMO changes and the application of subsidies on a per-tree basis will mean a considerable loss to Greek producers, as their trees are more productive than Italian and Spanish trees. They also claim that Spanish and Italian producers have embarked in a 'race' by planting millions of trees, sometimes in areas unsuitable for olive growing. Greek authorities fear that producers may only consider planting new trees, without taking care of established groves or caring for quality (Maraveyas and Mermigas).

Figure 36 Greece Olives

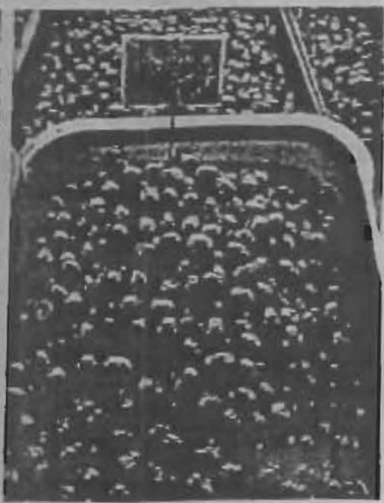
The Olive Shop of Sabbas Psychogios in the Agora, Athens

Greece is famous for it's olives and its varieties. Kalamata olives from the Peleponnese are probably the most famous. The Olive Shop of Sabbas Psychogios is located in the section of the Agora meat market closest to Omonia square.

The shop specializes in olives from all over Greece. Olives are known by the name of the region they come from. Each region has a different way of making their olives.

Amfissa Greek Olives

Agriniou Greek Olives



Kalamata Greek Olives

Amfissa Dried Olives

Gigas Greek Olives

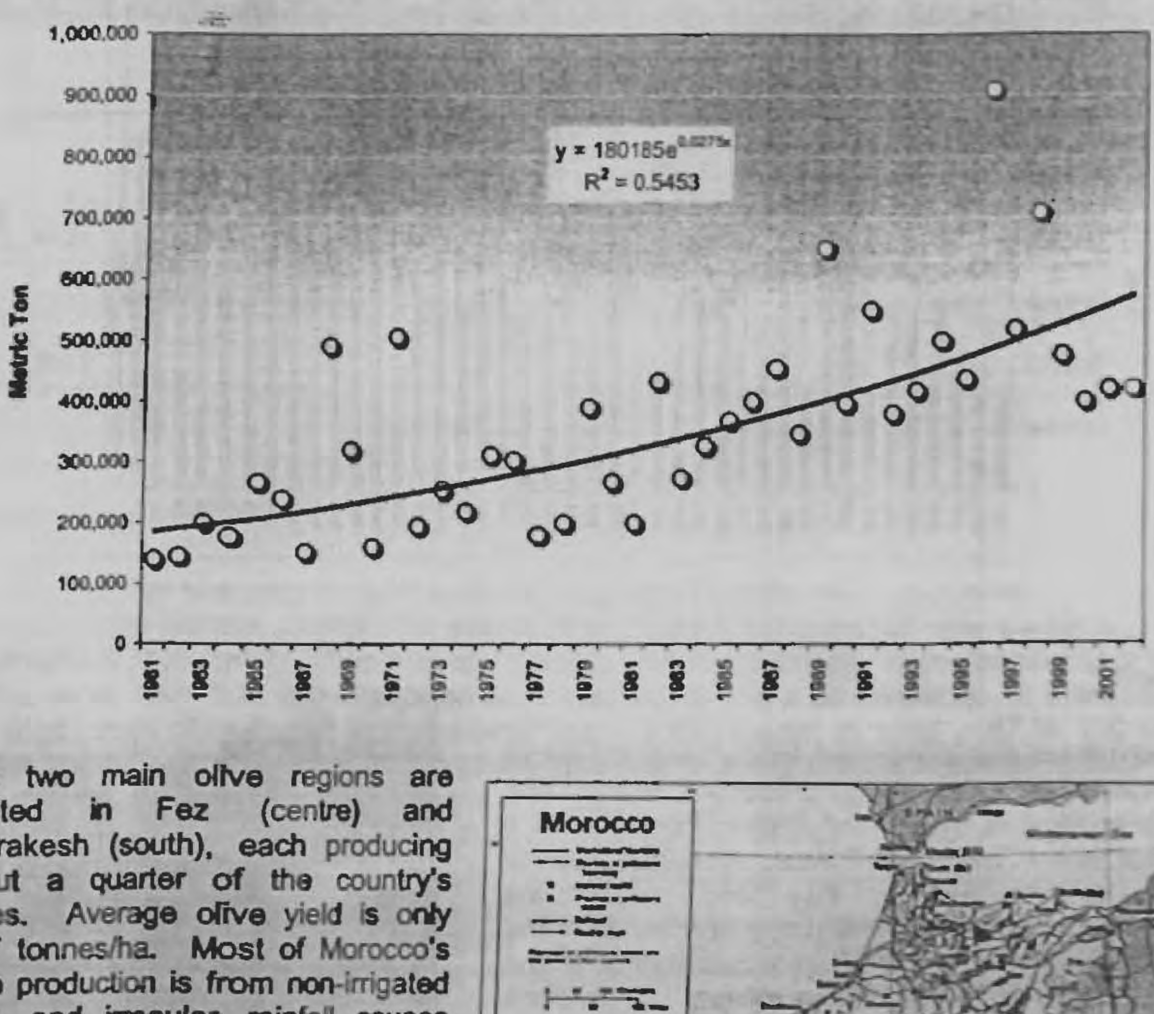
Halkikis Greek Olives

Morocco

Olive Production

In 2002, Morocco had an estimated 45 million olive trees, of which 11 percent were of non-bearing age. More than 95 percent of the trees are of dual-purpose varieties and further plantings are planned.

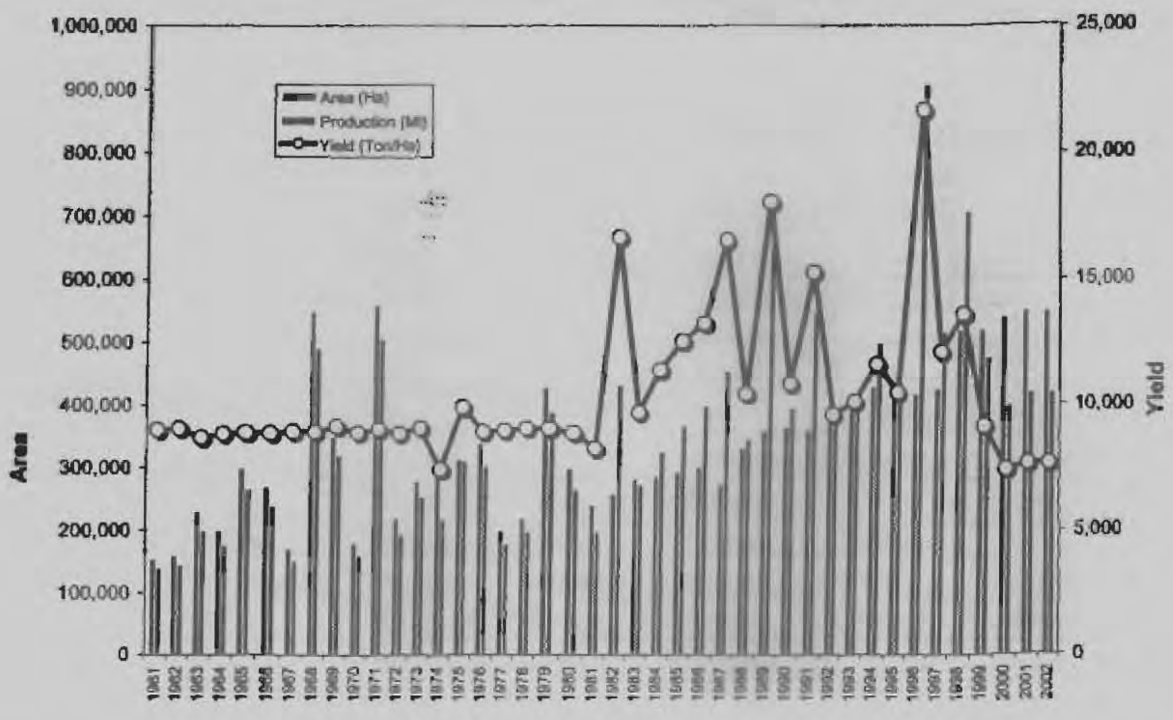
Figure 37 Morocco Olive Production Trend (Mt)



The two main olive regions are located in Fez (centre) and Marrakesh (south), each producing about a quarter of the country's olives. Average olive yield is only 1.67 tonnes/ha. Most of Morocco's olive production is from non-irrigated land, and irregular rainfall causes production variations from one year to the next. For example, production fell in 1995 when Morocco experienced one of its worst droughts in 30 years; the following year, there was a record harvest of approximately 800 000 tonnes. In 1997 production again fell to 1995 levels. In spite of these weather related factors, average production has increased during the past decade, mainly due to the government's support to modernise

and develop the olive industry. Table olive production increased from 80 000 tonnes in 1992 – 93 to 100 000 tonnes in 1996 – 97 and reached 420 000 tonnes in 2002.

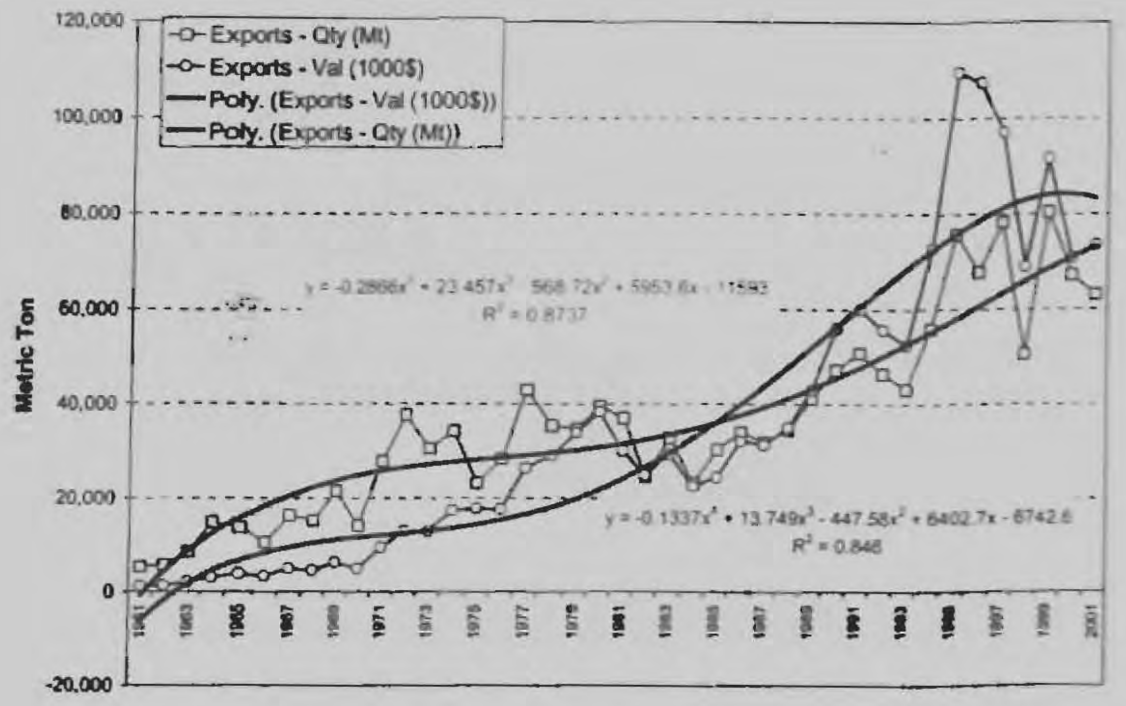
Figure 38 Morocco Olives: Area, Production, and Yield, 1961-2002



Trade

Most olives are consumed locally; exports occur sporadically following high production years. The main market is the United States, Italy, and to a lesser extent Spain and France. A characteristic of olive exports is that they tend to fluctuate depending on the availability of supply and demand on international markets. Morocco's strength in the olive trade lies with table olives. It exports approximately half of its table olive production and is one of the world's largest exporters of table olives, particularly of black olives. Exports have tended to decline in the last couple of years as a percentage of their production.

Figure 39 Morocco Olives Export and Trend



Recent Developments

The government has established a series of programs to assist the development of the olive industry. They include subsidies for pest control, the free distribution of olive seedlings, and the provision of technical information and training in olive production. At the beginning of the 1990s, more than 500 000 olive trees were distributed. As a consequence of these olive plantings, table olive production increased from 70 000 tonnes in 1986 – 87 to 100 000 tonnes in 1996 – 97. Exports of table olives have also risen significantly over that period.

Local consumption of table olives increased from 19 500 tonnes in 1986 – 87 to 29 000 tonnes in 1996 – 97.

Morocco is likely to continue to consume almost all its production of olive, exporting only when there is a production surplus. However, it is likely that to become a significant exporter of table olives.

Italy

Olive Production

Italy is a leading olive producer and in 2002 had 1 114 500 hectares dedicated to olive cultivation. The main producing regions are Puglia, Calabria, Sicily and Campania. Production of raw olives in 2002 was 2 732 000 tonnes.

Figure 40 Italy Olive Production and Projections

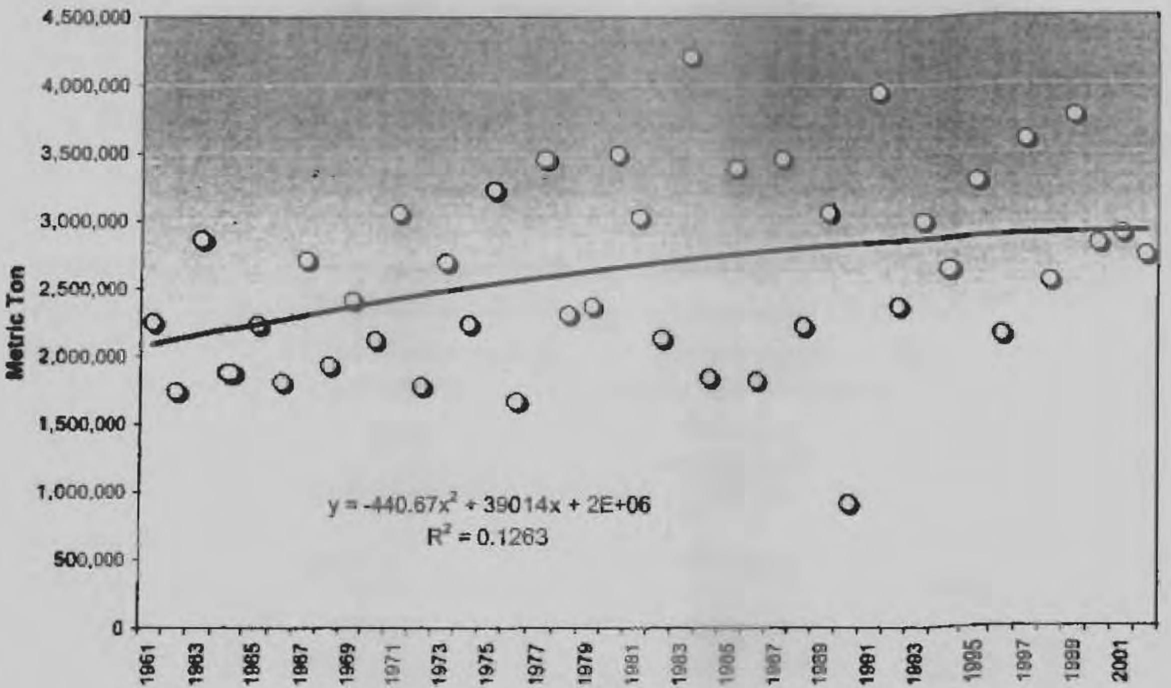
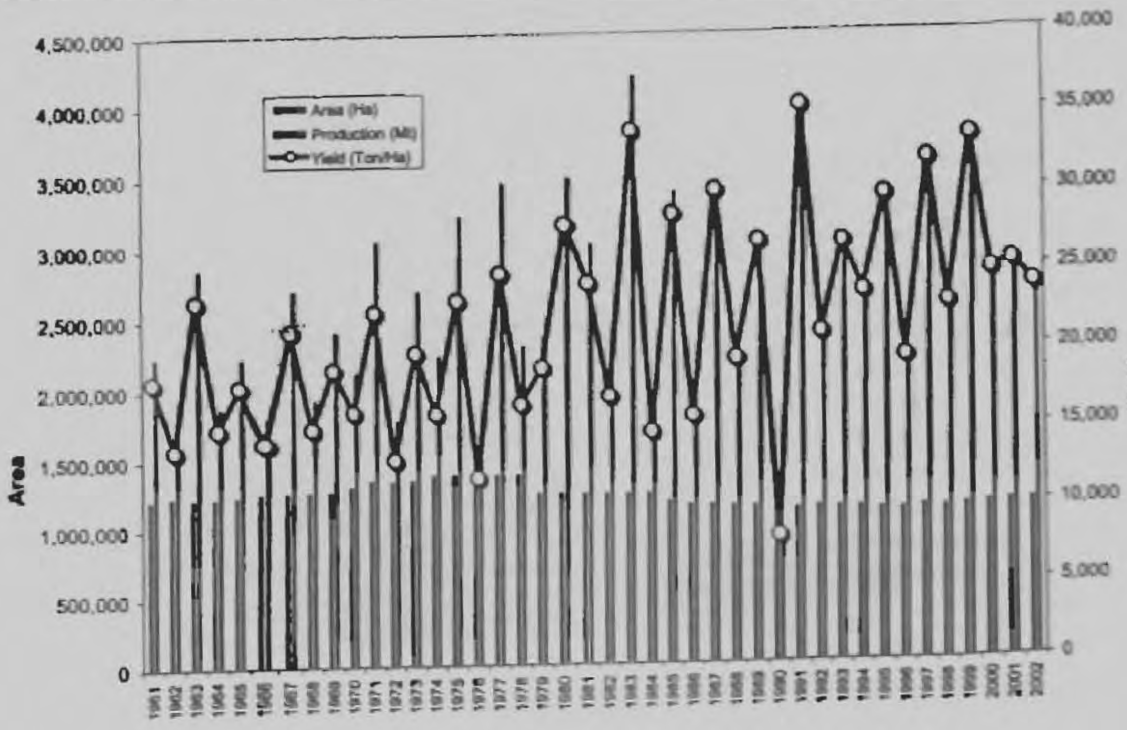


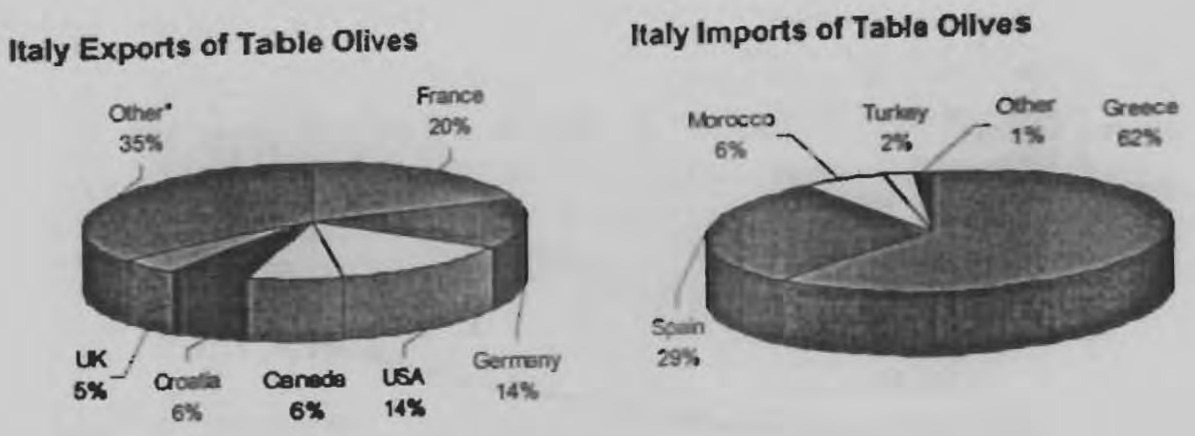
Figure 41 Italy Olives: Area, Production, and Yield, (19961 – 2002)



Trade

Italy is a net importer of table olives, importing close to 61 000 tonnes and exporting only 2, 700 tonnes in 2002. In that year France (20%), Germany (14%) and the United States (14%) were the main markets for Italian table olives. Greece (62%) and Spain (29%) were the main suppliers.

Figure 42 Italy Table Olive Trade



Turkey

Olive Production

Olives have always been an important industry in Turkey. Olive production in Turkey has varied significantly from year to year over the past 15-year period. Some have attributed these fluctuations to changing weather patterns, poorly managed olive groves, inefficient processing techniques and, more recently, inadequate marketing organisations (Akay and Dizdaroglu). Turkey's production of table olive more than doubled - from 100 000 to 216 000 tonnes in the past 5 years.

It is estimated that Turkey has about 100 million trees in 323 986 holdings totalling 880 000 hectares, representing about 4 percent of the country's agricultural land (Tunalioglu 1997). More than 60 percent of olive plantations are between 10 and 80 years old; 30 percent are more than 80 years old and the remaining 10 percent are less than 10 years old (Sahinalp 1997). Most of the olive production occurs around the Aegean area, which has 75 percent of the olive groves. The latest figures suggest that approximately 3 000 000 new trees will be planted in the near future, of which 83 percent will be of the dual-purpose variety (IOOC 1997e). This will make Turkey a bigger player in the international market.

Figure 43 Turkey: Olive Production Trend, 19961 – 2002

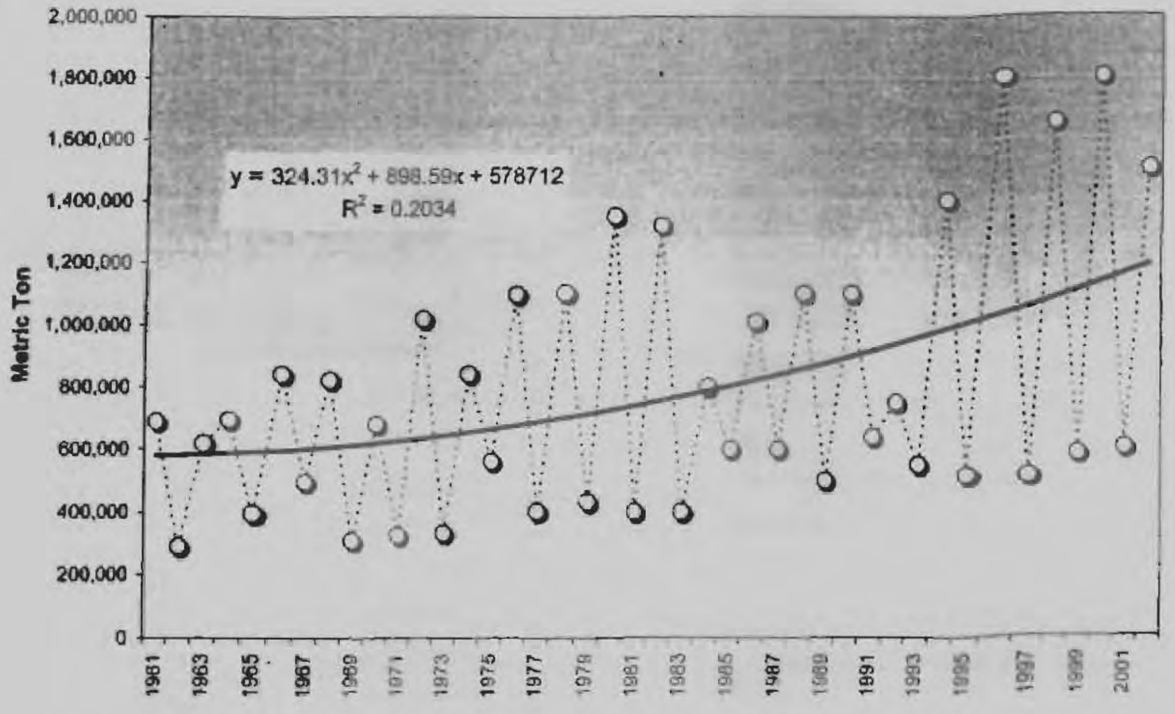
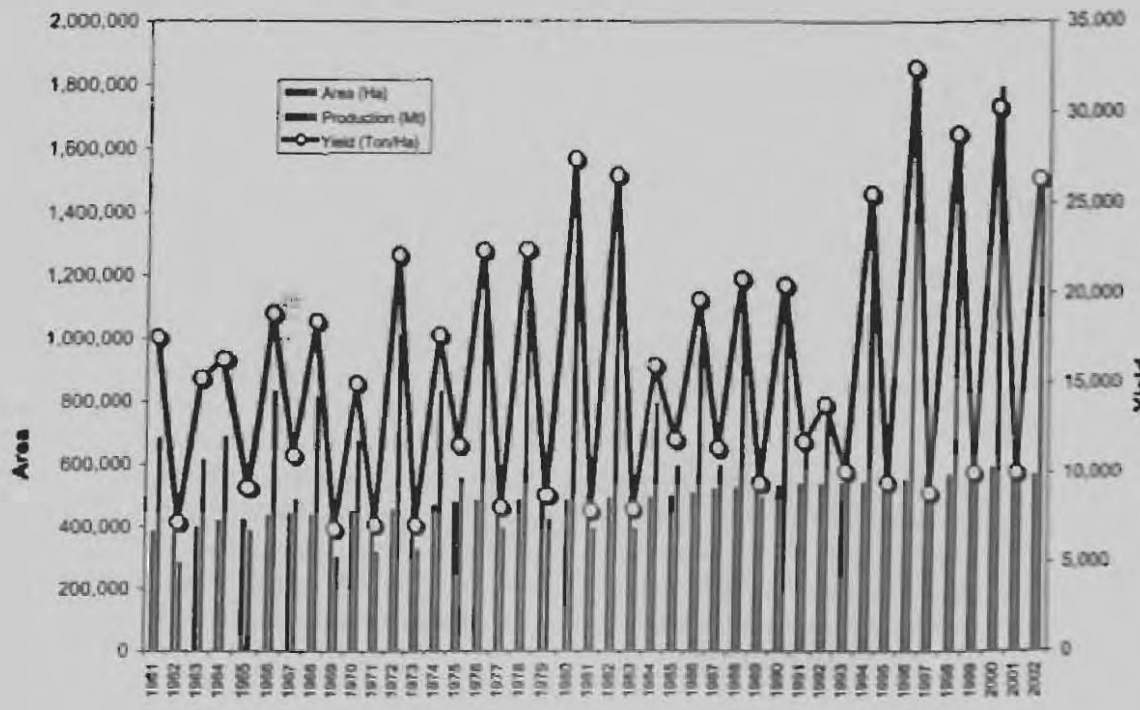
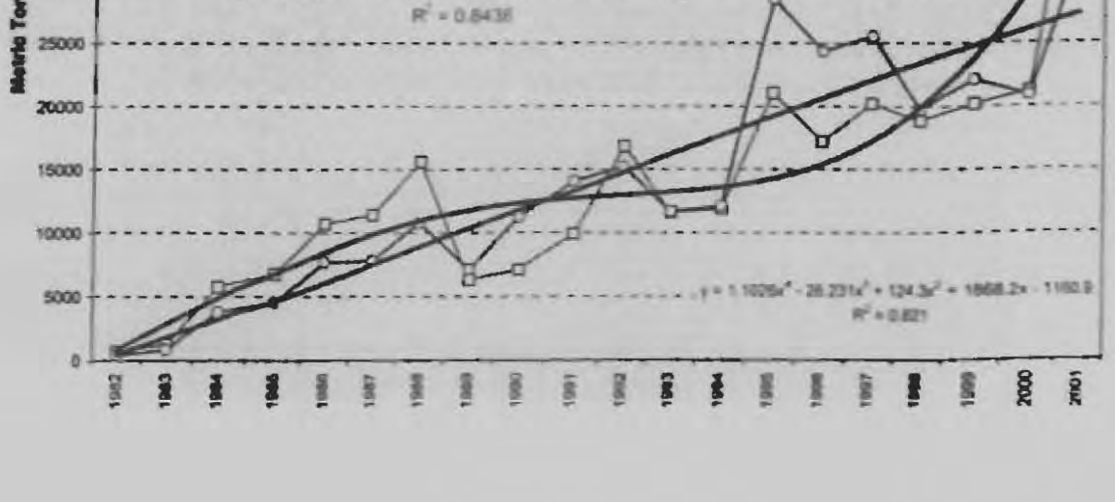


Figure 44 Turkey Olive Area, Production, Yield (1961 – 2002)



Trade: Turkey is one of the leading exporters of olive products. In 1996, it exported 17 700 tonnes (US$24.8 million) of olives. During the 1980s, Romania, Germany, Spain and Bulgaria have been the major export markets, while the United States is emerging as an important market.

Figure 45 Turkey Olive Trade, 1982-2002



The government has established an export tax refund system, whereby all taxes and duties paid on exports from the olive grove are refunded. Turkey enjoys preferential treatment with the EU, which entitles its products to enter the EU market at a much lower rate of duty.

Turkey Exports of Table Olive

The Industry

Most of Turkey's olive holdings are family-run enterprises. There are also approximately one thousand small mills and about ten refining plants. It is believed that the olive sector uses inefficient production methods and produces a poor quality product (Tunalioglu). Although there are some quality standards that producers must meet, it is reported that these are not strictly adhered to.

The industry is perceived as being fragmented; only 17.7 percent of table olive producers belong to a cooperative. The two major cooperatives are the Marmara Birlik (Marmara Union) with 12 percent of olive producers, and Taris with 5.7 percent. Although the government is responsible for the development of the country's olive policy, these cooperatives play an important role in the sector, being responsible for the purchasing operations, storage and trade activities.

Recent Developments

There has been a process of technology transfer to Turkey from the industry in other European countries.

The government has actively promoted the industry. For example, it has established a program encouraging the development of various olive growing areas, mainly in Akhisar and Aydin. It has also applied a minimum export price for black and green olives, to prevent the export of unprocessed table olives and thus retain value-adding activities in the country. Another important development is the growth of a strong nursery sector that produces 3.5 million trees per year. The government has also established olive growing areas to demonstrate increased efficiencies through proper maintenance of groves resulting in increased olive yield. Courses and information programs are being conducted to educate growers on pruning techniques, the latest available technology and production techniques, and to provide products for pest and disease control.

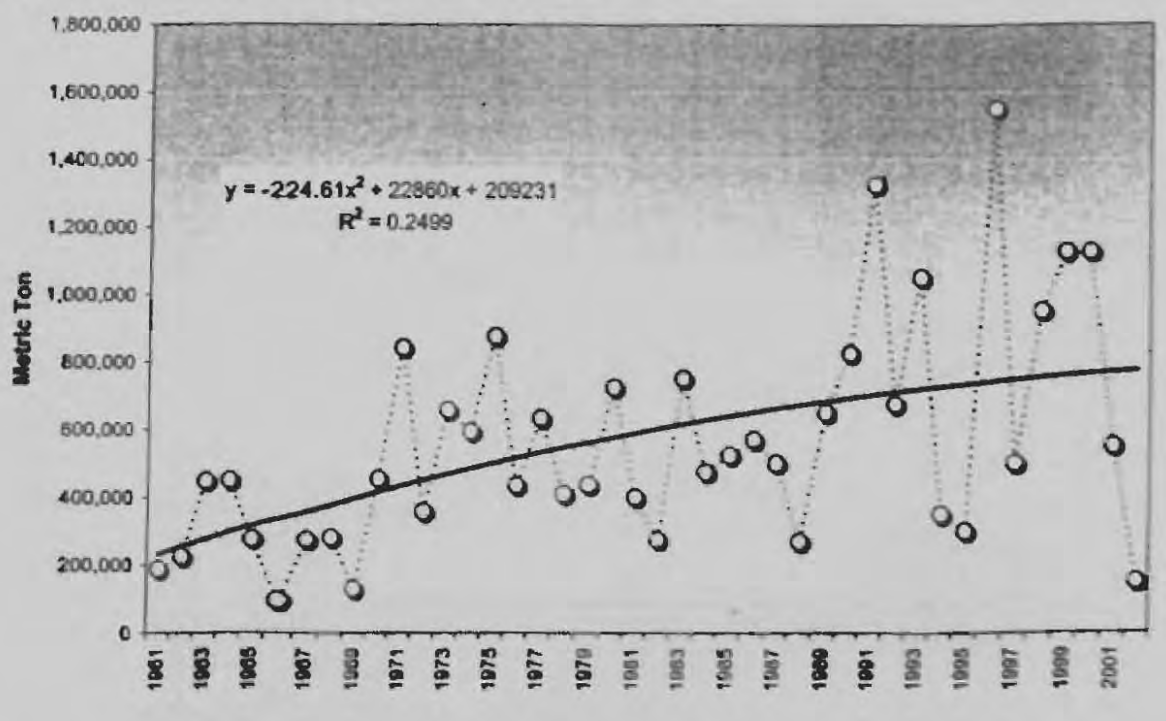
Consumption of table olives has also increased from 90 000 tonnes in 1992 – 93 to 160 000 tonnes in 1996 – 97. During the 1996 – 97 crop year Turkey was the major consumer of black olives, accounting for 30 percent of total world consumption (IOOC 1997b).

Tunisia

Olive Production

Olive production has fluctuated over the years due to weather conditions, the alternate bearing nature of the olive tree, and cultivation practices. For example, after a near record production of 1 250 000 tonnes in 1996, Tunisia produced only 500 000 tonnes in 1997. Environmental factors such as limited water resources, deforestation, overgrazing, soil erosion and desertification, and the fact that most of the olive groves are in dryland situations, accentuate the effect. Table olive production experienced a similar pattern with 9 000 tonnes in 1995 – 96 and 15 000 tonnes in 1996 – 97.

Figure 46 Tunisia Olives Production and Trend

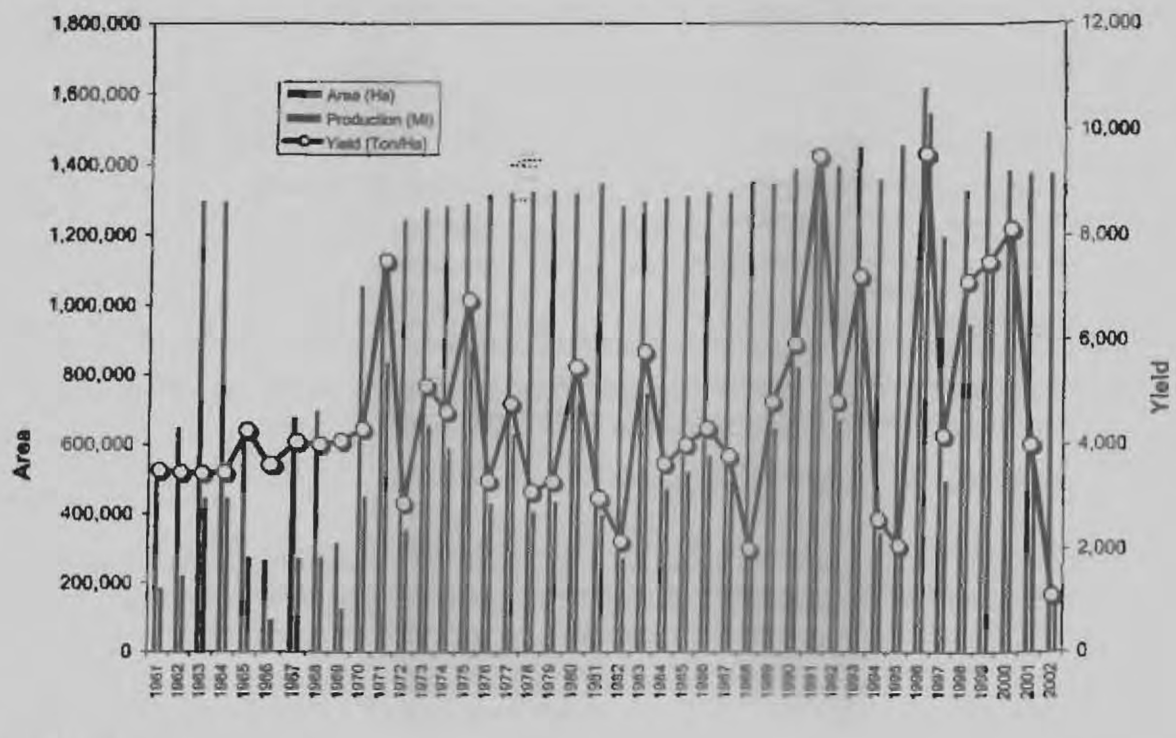


The production of olives is the main activity of the 87 880 agricultural holdings in the country, employing almost 1 million people. Most of the groves are located in the centre of Tunisia, which has 37 percent of all holdings.

There are approximately 57 million olive trees planted on an area of 1.5 million hectares. Seventy-four percent of trees are of bearing age, 17.5 percent are young groves and the balance is described as "old groves." There are also about 17 000 hectares recently planted with 2 million trees for table olive production. Approximately 60 percent of these trees are not yet bearing and 28 percent are on irrigated land. The two most popular olive varieties planted are Chimlali and Chetoiu.

Productivity is relatively low due to the unsuitability of land used for production and the poor management practices employed (DGPA/ONH 1996). Holdings are getting smaller and production costs, mainly labor, are increasing. Producers tend to use traditional harvesting and production techniques, being slow to embrace modern practices.

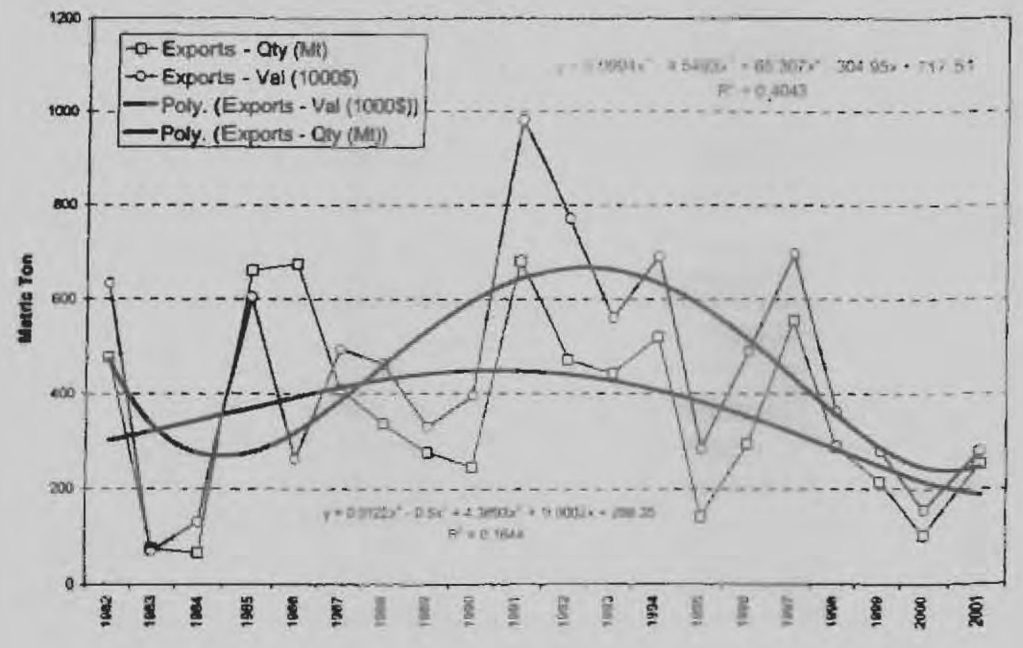
Figure 47 Tunisia Area, Production, and Yield (1961 – 2002)



Olive Trade

Olives are Tunisia's main agricultural export, accounting for 5.5 percent of total exports (47 percent of agricultural exports). They are the country's fifth most important source of foreign earnings. In 1996 Tunisia exported 337 tonnes (US$0.5 million) of olives.

Figure 48 Tunisia Olive Trade



Tunisia recently gained 'favoured country status' from the EU, which entitles it to duty free access to European markets. Tunisia has a fixed import quota into the EU of 46 000 tonnes per year (Polidori, Rocchi and Stefani 1997). The *Office National de l'Huile* (ONH) has offices in France and Italy, its main objective being to promote Tunisian olive in the European markets and to promote technical and scientific collaboration between EU producers and Tunisian producers. Traditionally, olive has been bought by Italy and re-processed for sale. Lately, Tunisia has been looking for new markets outside the Mediterranean region. The government has adopted a range of export-oriented strategies. The objective is to produce 250 000 tonnes of olive by the year 2010, of which 50 percent will be for Australian consumption and 50 percent for export.

The Industry

There are 87 880 olive holdings and 1 400 operating olive processing plants in Tunisia. Approximately 27 percent of the processing plants are super-presses, 27 percent continuous process facilities and 7.5 percent combined systems. Traditional plants account for only 39 percent of the processing operations. There are 13 refineries and 10 packing plants (DGPA/ONH 1996).

The government recently designed a series of schemes to restructure and modernize olive production and improve quality. For example, it has developed programs to improve quality control standards in accordance with IOOC practices, and to modernise the existing refineries and mills. It has fostered the development of plants in areas of limited processing capability and has introduced subsidies for restructuring olive groves. Furthermore, olive production has received substantial financial assistance from the World Food Program and the government (ibid.).

Up to 1994 the ONH was the only organization involved in the collection and marketing of olive. Although the government has permitted some competition in the industry, the ONH is the principal channel for Tunisia's olive exports. It is responsible for setting quality standards, promoting grove protection, encouraging improved cultivation practices and representing the industry.

There are about nineteen cooperatives or associations involved in processing and selling olive. There are only about fifty private exporters, who work in close collaboration with the ONH. There are no established producer representative organizations in the industry.

Local consumption to 1993 was subject to consumption restrictions whereby a family was allocated a maximum quota. With the liberalisation of the industry, the quota no longer applies. Despite these changes, less than 28 percent of Tunisia's production is consumed locally as consumption has slowly decreased during the past twenty years.

Syria

Olive Production

Syria is the second largest olive producer in the Arab world after Egypt. It has 57 million trees, of which only 30 million are productive. The groves occupy 405 000 hectares of mainly non-irrigated land. Production of olives has fluctuated over the years. During the 1996 – 97 crop year Syria produced 85 000 tonnes of table olives. Syria has the highest per capita consumption of table olives in the world (5 kg).

Figure 49 Syria Olives Production and Projections

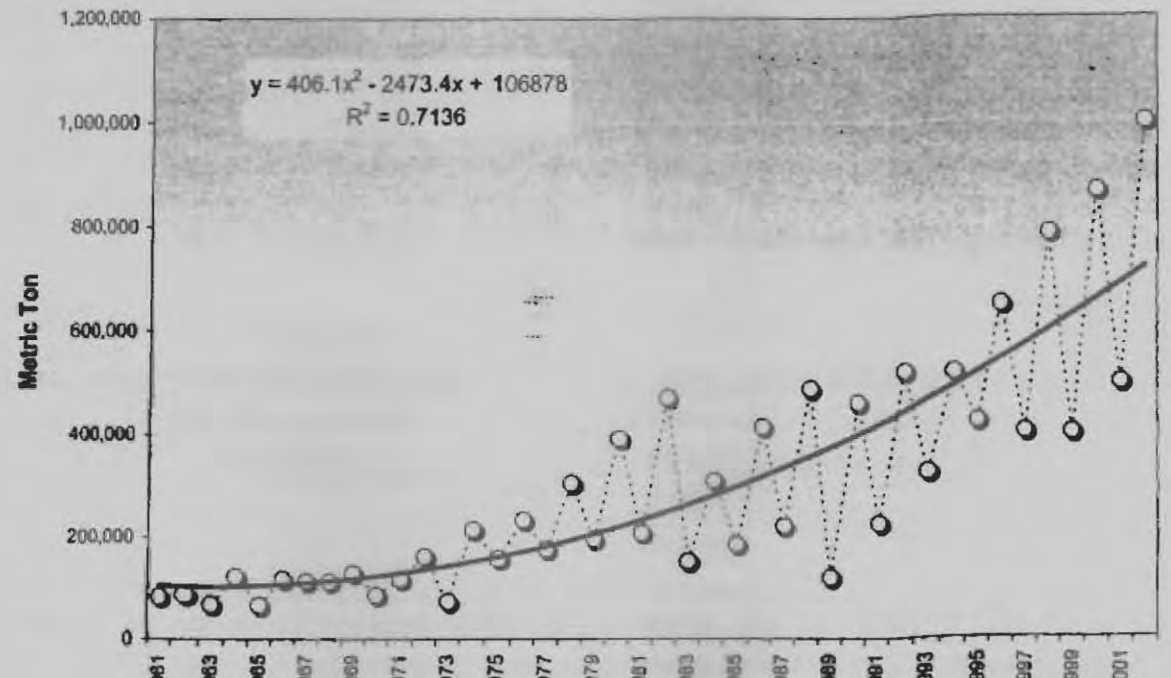
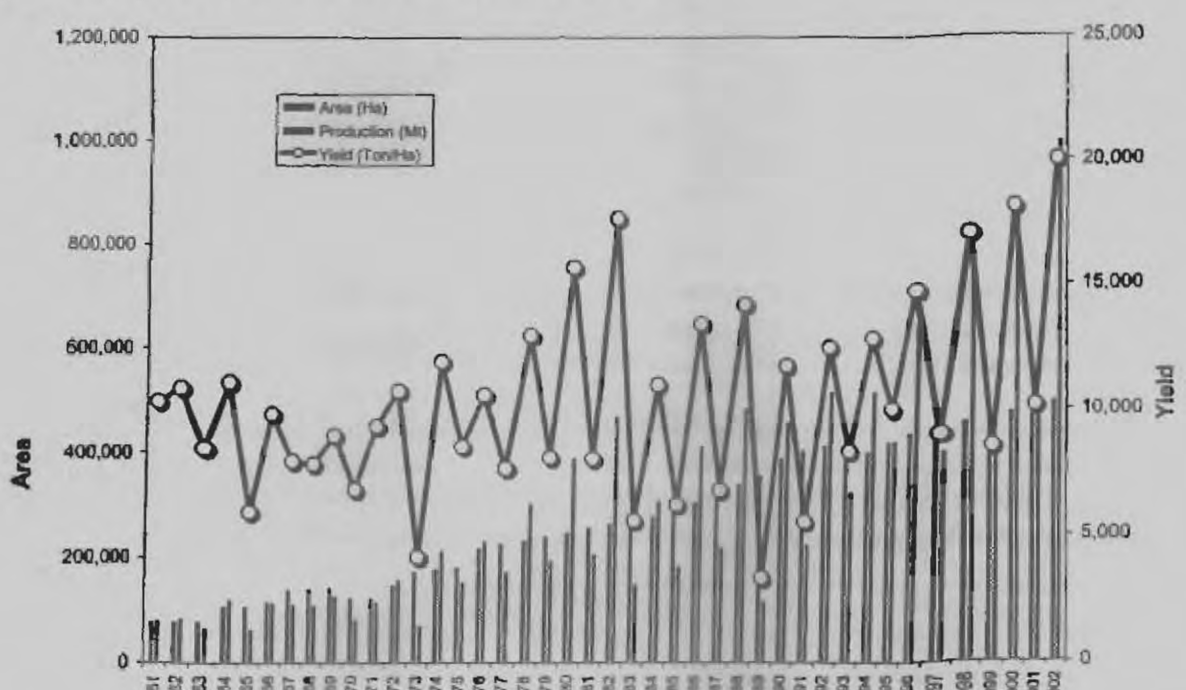


Figure 50 Syria Olives: Area, Production, and Yield



Trade

Traditionally most of Syria's olive products are consumed in the local market. In 1996 – 97 only 10 000 tonnes of olive less than 10 percent of production was exported. Almost all Syria's table olive production is for local consumption; small quantities are exported to Germany and the United Kingdom. Syria imports minimal quantities of table olives.

Recent Developments

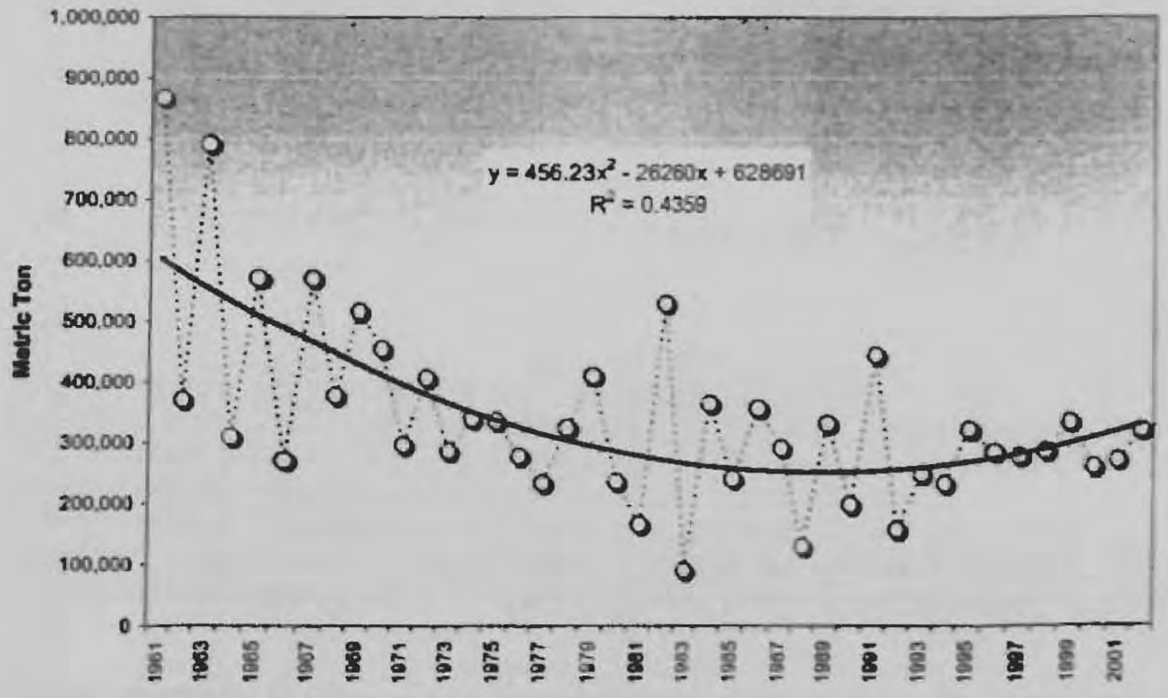
The government's objective is to increase production of raw olives to 680 000 tonnes by the year 2005. This would be achieved through the development of nurseries for plant propagation, provision of machinery for improved cultural operations, and implementation of plant protection schemes to control pests and diseases. The government has constructed two main dams to boost agricultural production, reducing crop dependence on rainfall. It aims to have 63 million olive trees planted by the year 2005.

Portugal

Olive Production

Portugal is the fourth largest European producer of olive products. There has, however, been a marked decrease in olive production since the beginning of the 1980s, when output reached more than 500 000 tonnes. In 1997, production amounted to only 300 000 tonnes.

Figure 51 Portugal Olives Production Trend and Projections



According to EU estimates, in 1996 Portugal had 38 million olive trees cultivated on an area of 319 790 hectares (EC 1998). There are around 1.1 million trees of non-bearing age and it is planned to plant a further 375 000 trees in the near future.

The major areas of production are Alentejo (43%), Tras-os-Montes (20%) and Beire Interior (18%). The variety 'Galega', accounts for 80 percent of the total olive groves. Olive production in Portugal is characterised by traditional family-owned holdings with an average area of less than 2 hectares, with the exception of Alentejo were the average area is 5.4 hectares. There are 80 to 100 trees per hectare (Castro et al. 1997). Less than 10 percent of area harvested is devoted to table olives.

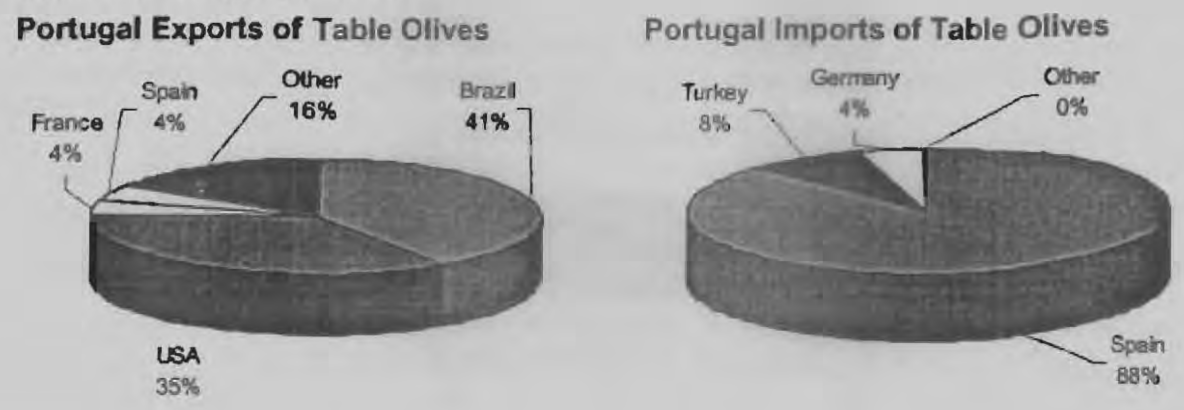
On average, EU yields for table olive production are 1.218 tonnes/ha and 2.339 tonnes/ha for production (EC 1998). Portuguese olive yields for table olives are 0.995 tonnes/ha, and 0.603 tonnes/ha for olive, well below the European averages (EC 1998).

Olive Trade

Portugal exports about 30 percent of its total production. Exports of olive products represent not only economic value but also have a traditional significance, as they are mostly exported to countries with strong cultural and historic links to Portugal. In 2002 most went to Brazil (64%), Spain (12%) and Portuguese-speaking African countries.

In 1996, Portugal exported 9 000 tonnes of table olives, mainly to Brazil (41%) and the United States (35%). Portugal also imported almost 7 000 tonnes, mainly from Spain (88%).

Figure 52 Portugal Olive Trade



Recent Developments

Due to the socio-economic and cultural importance of the olive industry, the government has designated the olive industry as a priority and has drawn up the *Plano Nacional para a Denimizacao da Fileira Oleica* (National Plan for the Development of the Olive Industry). The goals of this plan are to increase the productivity of the industry, establish environmentally sound practices and improve the quality. It is expected that approximately 20 percent of the processing plants that currently use traditional methods will be modernized. The major production area of Alentejo has invested in the modernization of olive groves and processing plants.

More than 15 000 hectares of intensive olive plantations were established during the period 1987 – 1996 in an attempt to check the downward trend in Portuguese olive production. Quality assurance programs were also established for the olive production (Castro).

The Portuguese Department of Agriculture has expressed concern at the proposed modifications to the Common Market Organisation (CMO) subsidies scheme. It is believed that the changes will promote unemployment, may induce abandonment of existing groves and may indirectly cause soil erosion.

Concluding Remarks

This analysis has alluded to the importance of olive production in the countries examined. In many cases, the industry is experiencing significant changes such as expansion, modernization of harvesting and processing techniques, rationalization, and improvement in quality standards. These changes are likely to have a substantial impact on productivity and levels of production. The IOOC and the European Commission have recognized this and have initiated campaigns to increase consumption. If consumption does not keep pace with production, oversupply in the world market for olive products will occur, resulting in depressed prices worldwide.

Egypt Export Situation and Opportunities

Egypt had shipped only very limited quantities of olives to the U.S. market over the five-year period covering calendar years 1995 through 1999. The largest shipments over this period occurred in CY 1996, when 17 MT were exported at a CIF value of $37,000. Shipments amounting to only a few thousand dollars took place in calendar years 1995, 1997 and 1999.

Does Egypt have the capability and capacity to be a player in the US olive market?

The Central Agency for Public Mobilization and Statistics (CAPMAS) continues to do funny things in their reporting, making it difficult to correlate trade flow data with other statistical data bases. They report olive exports under five HTS codes, none of which correlate to internationally recognized codes. The descriptions are truncated and do not match, either. The best one can do is to "mirror image" the data using more reliable trade data reporting services.

Notwithstanding the above, and assuming consistent error, we are able to derive some basic information from the CAPMAS data that should help in decision making and directing the Egyptian table olive processors towards more lucrative markets.

Egypt exported olives to thirteen countries in 1998. They exported to nine countries in 1999. Of the nine countries in that year, four were new, representing a "swing" of eight markets, or almost two thirds of the 1998 market base. Further, an unhealthy dependency existed in 1999 on two countries: Israel accounted for 71% of the total volume and India accounted for 75% of the total value. The dependency is serious when one looks at the prices. Israel paid 19% of the average price and 16% of the weighted average price for this predominant classification. India paid 388% of the average price and 332% of the weighted average price. Yet India absorbed only 6% of the volume.

And Egyptian olive producers were seriously losing price negotiations in Palestine and Israel, only marginally improving in francophone Europe, holding the line in the Gulf markets and competing well on price in the United States, but with low volumes.

By 2001, it was clear that Egyptian table olive processors had expanded to more stable markets. A number of these consist of discriminating end users. Contrary to the previous trade that was substantially re-export oriented, the countries that Egypt is exporting to now are certainly more substantive and number seventeen, including seven EU countries, the United States and Japan, as well four Gulf States. Egypt is also exporting to Libya, Sudan and the Congo. The average exported value per kilogram in 2001 was US$0.68, which reflected the average price sold to Spain.

What is also obvious is that the market varies. "Olives prepared or preserved by vinegar or other," HTS code 2001901010 certainly attests to this. Egyptians sold this product to Germany, France and Greece for $0.25, $0.24 and $0.23/kg respectively. And Qatar and Saudi Arabia proved to be tough customers as well, buying at $0.24 and $0.36 respectively. Egypt sold the same product to the United Arab Emirates for $0.89/kg, Italy for $0.82/kg, the USA for $0.89/kg. The only explanation for this contradiction in prices is either significant differences in quality or the sellers are getting out-negotiated. If quality is not the issue, then Egyptian sellers should concentrate on the high value markets. This category represents 20% of Egypt's table olive exports.

HTS code 2005700010 "Olive with stone prepared or preserved not by vinegar" represented 44% of the exports, or 585MT, in 2001. Kuwait took 420MT of this product, or 72%, at $0.50/kg. Other buyers were Greece at $1.12/kg, Japan at $0.51/kg, Libya at $0.44/kg, Congo at $10.1/kg and Saudi Arabia at $0.46/kg.

HTS code 2001901020 "Olive, stoneless prepared or preserved by vinegar or other" enjoyed the higher prices, Kuwait paying $1.07/kg and the USA $1.16/kg.

Last year, CY2002, demonstrated that our table olive processors had gotten aggressive and substantially increased their customer base as well as almost doubling their exports in terms of volume and by 68% in value. But the average price eroded from $0.68/kg to $0.64/kg. And market penetration increased to nineteen countries, including, Australia, Armenia, Malta, Brazil, Canada and Sweden.

One area where Egypt is faring well is with HTS code 2005700010 "Olive with stone prepared or preserved not by vinegar", and HTS code 2001901010 "Olives prepared or preserved by vinegar or other." Spain prices averaged $0.93 kg. In 2002, exports to Spain increased by 435%, representing about 11% of the table olive exports. But these same olives are sold by Spain, depending on HTS code, to the United States at considerably higher price points. <u>The value of knowing ones' market and building customer relations is the moral of the above scenario</u>.

Summary and Recommendations

It is clear that Egypt has the capacity to produce olives in sufficient quantities to at least attempt to gain entry in the US market. Only a 1% market share of the US imports represents a 943MT export potential, but represents less than one half of 1% of Egyptian production. At an average price of $1.75/kg, a 1% market share would represent olive export sales from Egypt in excess of $3,665,000.

The USA increased its imports from Egypt significantly by 790%. And prices paid by the USA were consistently at the top end, ranging primarily from $1.00 to $1.63/kg. During the study tour to the Fancy Food Show in New York City in July 2003, there was substantial interest voiced in Egyptian olives by potential buyers in the US. It became apparent that an Egyptian producer of olives sold to a Spanish company, who in turn sold to a particular buyer in the States.

If Egypt were to target 1% of the US import market by bypassing Spanish resellers, this would only represent a 1.5% portion of Spain's exports – not a large enough erosion of market share to instigate retaliatory or predatory measures by Spanish suppliers. Even if Egypt were to inadvertently take Greek or Moroccan market share, the "hit", if singly apportioned, would represent 8.5% of a single country's market share. Divided proportionately, the erosion in Greek or Moroccan market share would be slightly more than 4%. In any scenario, this would certainly be attainable in the first year.

Based on this preliminary analysis of the U.S. import trade in olives, Egyptian olive exporters will have to aggressively market their products on the U.S. market, and will most probably need to offer delivered export price levels that are highly competitive with those from Spain, Greece, and Morocco. Egypt is a growing player in the U.S. market for olives and exporters and will most likely need to be in a position to offer landed export prices at levels at or below those of their competitor companies in Spain, Greece and Morocco, in order to develop any significant new long-term export business.

In the interim, however, given the crop shortage in the Mediterranean countries of Europe, and the 30% increase in packaging costs due to the currency exchange rate with the US dollar, we recommend at a minimum that Egyptian table olive processors should raise their prices over last year's by at least 25%. ALEB is currently completing price modelling and sensitivity analyses to confirm competitive price ranges. This information will be disseminated by broadcast call and posted to the ALEB website as it becomes available.

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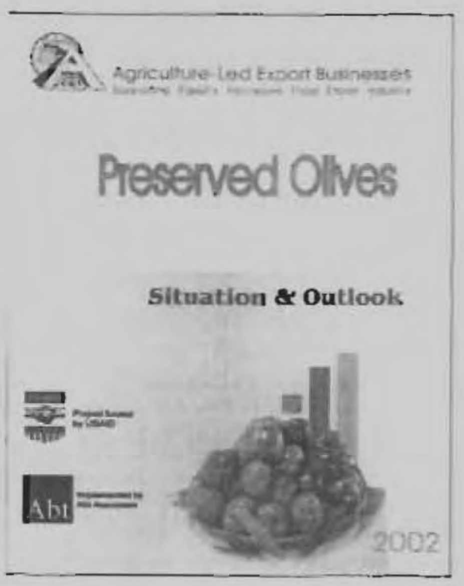

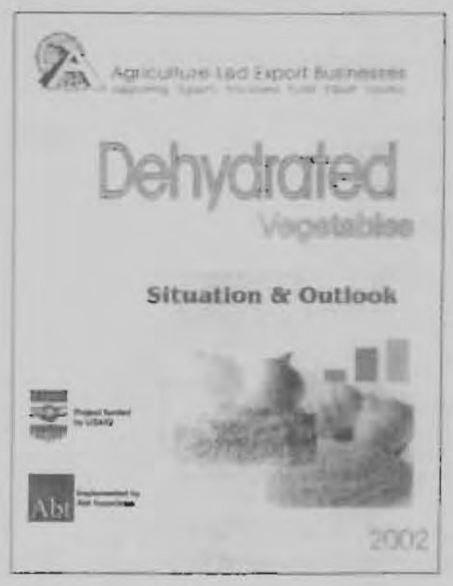

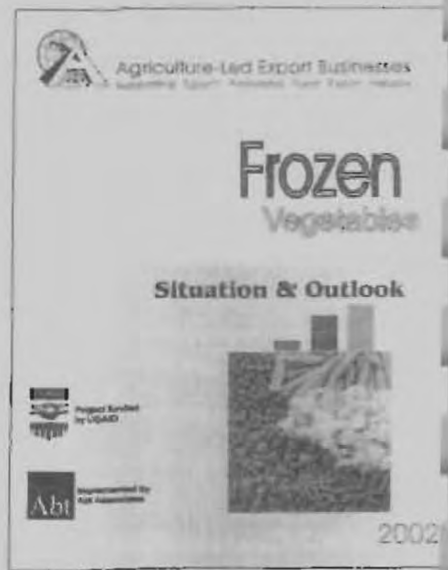

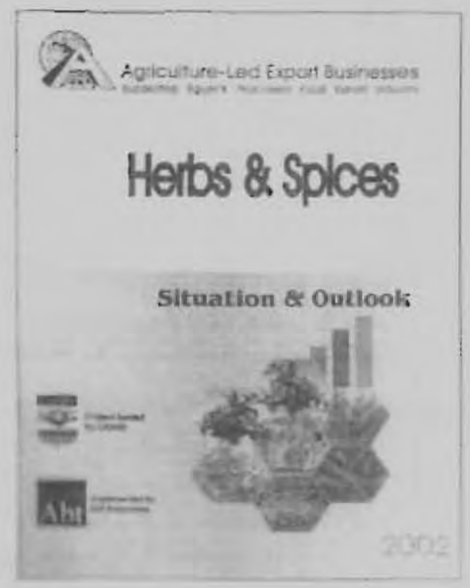

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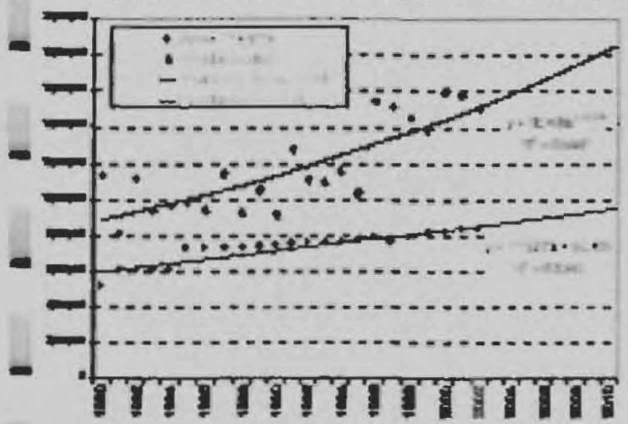

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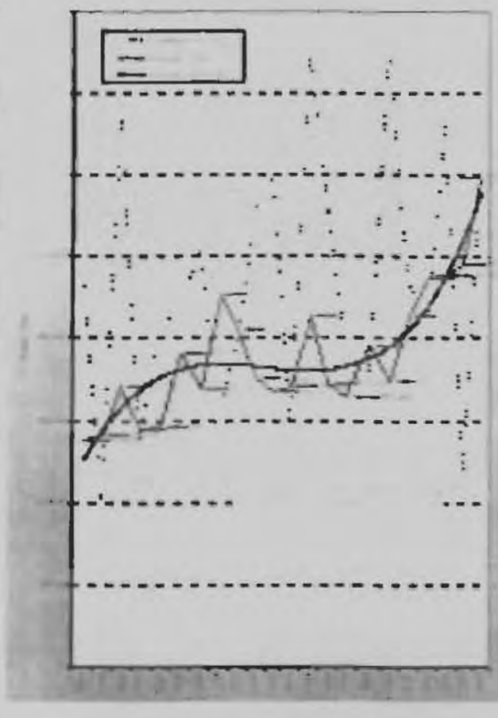
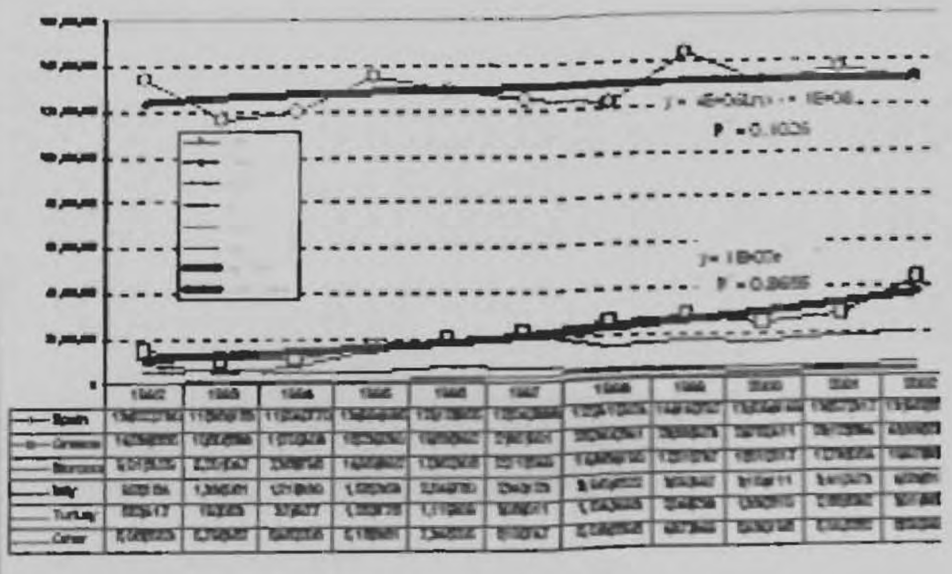


Competitors behavior and trends

Figure 1 US Table Olive Imports: Major Suppliers and Trends, 1992-2002



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