Yearly Olive Oil Consumption and Production in Tunisia, Italy, and Spain (2010-2024)

Executive Summary:

This report provides an analysis of the yearly olive oil production and consumption trends in Tunisia, Italy, and Spain from 2010 to 2024. These three Mediterranean nations are significant players in the global olive oil market, each exhibiting unique patterns influenced by climate, economic factors, agricultural policies, and consumer preferences. The analysis reveals that Spain consistently holds the position of the world's largest producer, with Italy as a major producer and consumer, and Tunisia as a smaller but important producer with a strong export focus. Production in all three countries shows fluctuations, often linked to weather conditions and agricultural cycles. Consumption patterns vary, with high domestic consumption in Spain and Italy, while Tunisia's consumption remains relatively low due to its export-oriented market. The regional market is interconnected, with trade flows reflecting the balance between production and consumption in each country.

Introduction:

Tunisia, Italy, and Spain are central to the global olive oil industry, possessing a rich history and a substantial share of both production and consumption. These countries not only contribute significantly to the world's olive oil supply but also reflect diverse market dynamics influenced by their unique agricultural landscapes, economic structures, and cultural traditions around olive oil. This report aims to dissect the yearly olive oil production and consumption figures for these three nations from 2010 to 2024. By examining the trends and the factors that have shaped them, this analysis seeks to provide a comprehensive understanding of the olive oil market in this critical Mediterranean region. The scope of this report encompasses the analysis of data derived from various websites and press articles, offering a detailed overview of the olive oil sector's evolution in Tunisia, Italy, and Spain over the specified fifteen-year period.

Olive Oil Production and Consumption in Tunisia (2010-2024):

Tunisia's olive oil production has demonstrated considerable variability throughout the period from 2010 to 2024. In 2010, production was estimated to be between 110,000 and 140,000 metric tons.[1] The following year, 2011, saw production around 120,000 metric tons.[4] The year 2012 experienced a range of production levels, from approximately 100,000 to 160,000 metric tons.[6] A notable increase occurred in 2013, with production reaching between 220,000 and 260,000 metric tons.[8] Tunisia achieved a record high in olive oil production in 2014/2015, with figures ranging from 320,000 to 350,000 metric tons.[9] However, production fell in 2015/2016 to around 140,000 to 150,000 metric tons.[9] The 2016/2017 season saw a further decrease, with production estimated between 100,000 and 140,000 metric tons.[14] A significant rebound occurred in 2017/2018, with production rising to approximately 240,000 to 300,000 metric tons.[16] In 2018/2019, production was around 120,000 to 130,000 metric tons.[20] Another record high was reached in 2019/2020, with production estimated between 340,000 and 440,000 metric tons.[23] Production then significantly dropped in 2020/2021 to around 140,000 metric tons.[25] The 2021/2022 season saw a recovery to approximately 180,000 to 240,000 metric tons.[26] Production in 2022/2023 was around 200,000 to 217,000 metric tons.[28] Estimates for 2023/2024 suggest production around 220,000 metric tons [28], and forecasts for 2024/2025 indicate an expected yield of approximately 340,000 metric tons.[31] This fluctuating production is largely attributed to Tunisia's reliance on rain-fed agriculture, making it susceptible to variations in weather patterns.[5] While Tunisia is a significant olive oil producer, its overall production volume generally remains lower compared to that of Spain and Italy.[23]

Domestic consumption of olive oil in Tunisia has remained relatively low in comparison to its production output. In 2010, per capita consumption was around 5 liters.[3] Annual consumption estimates generally range between 30,000 and 50,000 tons.[5] In 2015, per capita consumption was reported at 7.4 kg per year [35], while other data suggests an average per capita availability of around 4 kg annually.[36] The relatively low domestic consumption indicates a strong export orientation for Tunisia's olive oil sector.[5] Furthermore, price sensitivity appears to influence consumption patterns, with Tunisian consumers potentially opting for cheaper alternatives like seed oils when olive oil prices increase.[5] The overall trend in Tunisia's olive oil sector is characterized by these volatile production volumes, heavily influenced by weather conditions, alongside a consistent pattern of low domestic consumption and a primary focus on exports.

Several factors have influenced Tunisia's olive oil sector during this period. Climate variability, including rainfall patterns and temperatures, has played a crucial role in determining the success of olive harvests.[27] Agricultural policies and the dynamics of export markets have also significantly impacted the sector.[23] A notable aspect is Tunisia's heavy reliance on bulk exports, particularly to major olive oil producing countries like Spain and Italy.[23] This reliance makes Tunisia's olive oil industry somewhat vulnerable to the pricing strategies and market demands of these larger players. European importers often blend Tunisian olive oil with other oils without necessarily declaring its origin, which can hinder the recognition and profitability of Tunisian olive oil on the global market.[23] However, there has been a growing trend in Tunisia towards organic olive oil production.[5] By 2021, organic olive oil accounted for 44% of Tunisia's total production.[38] This increasing focus on organic production presents an opportunity for Tunisia to add value to its olive oil exports and diversify into higher-value markets.

Olive Oil Production and Consumption in Italy (2010-2024):

Italy's olive oil production between 2010 and 2024 has shown a general downward trend, particularly in the latter part of the period. In 2010/2011, production was estimated at around 548,000 to 550,000 tons.[3] Between 2010 and 2012, production exceeded 500,000 tons.[42] Specifically, in 2011/2012, production ranged from approximately 477,000 to 510,000 tons.[43] A drop occurred in 2012/2013, with production falling to around 273,000 to 302,000 tons.[8] There was a recovery in 2013/2014, with production reaching approximately 461,000 to 500,000 tons.[10] However, production decreased again in 2014/2015 to around 220,000 to 302,500 tons.[10] A recovery was seen in 2015/2016, with production around 300,000 to 328,000 tons.[14] A significant drop occurred in 2016/2017, with production estimated between 182,000 and 243,000 tons.[15] The 2017/2018 season witnessed a strong increase to around 428,000 to 486,000 tons.[19] Production fell in 2018/2019 to around 270,000 tons.[21] A notable increase was observed in 2019/2020, reaching approximately 365,000 tons.[25] Production dropped in 2020/2021 to around 270,000 to 273,500 tons.[25] The 2021/2022 season saw a slight increase to around 329,000 tons.[47] Production in 2022/2023 was around 240,000 to 288,900 tons.[42] Estimates for 2023/2024 are around 300,000 to 328,500 tons [47], and forecasts for 2024/2025 remain low.[32] This general downward trend in the latter part of the period has been attributed to various factors, including climate change, heatwaves, drought, and the impact of diseases such as the Xylella fastidiosa bacterium.[48]

Italy remains a significant consumer of olive oil, often ranking among the top countries globally. Consumption in 2010/2011 was around 660,000 to 675,000 tons.[56] Between 2011 and 2015, consumption fluctuated but generally stayed within the range of 700,000 to 848,000 tons.[44] However, consumption started to decline in the latter half of the decade, reaching around 421,000 tons in 2020/2021.[26] In 2021/2022 and 2022/2023, consumption was around 481,000 to 486,000 tons.[34] Estimates for 2023/2024 are around 415,000 tons [56], with projections for 2024/2025 suggesting a further decline to below 400,000 tons.[60] Despite its strong culinary tradition and consumer preference for olive oil, Italy has experienced a decreasing trend in consumption in recent years, potentially influenced by rising prices and evolving dietary habits.

The olive oil market in Italy is characterized by a persistent gap between domestic consumption and production, necessitating significant imports to meet demand and maintain export volumes.[37] Italy imports a substantial amount of olive oil, particularly from Spain and Tunisia, to bridge this gap.[37] In some regions of Italy, there is an increasing interest in organic olive oil production, reflecting a broader trend towards sustainable agriculture.[62] Several factors influence Italy's olive oil sector. Economic conditions, including price fluctuations and consumer purchasing power, play a significant role.[56] Italy's position within the European Union's olive oil market also has implications for its trade and agricultural policies. Furthermore, Italian consumers exhibit a strong preference for high-quality olive oil, including extra virgin varieties and products with Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI) certifications, which influences their purchasing decisions.[56] Regional variations in production also exist within Italy, with the southern regions historically accounting for the majority of output, although climate change is leading to increased production in the northern regions as well.[51]

Olive Oil Production and Consumption in Spain (2010-2024):

Spain has consistently held its position as the world's largest olive oil producer throughout the period from 2010 to 2024. In 2010/2011, production was estimated at around 1.37 to 1.4 million tons.[4] The 2011/2012 season saw a record high, with production reaching approximately 1.61 to 1.68 million tons.[43] Production dropped significantly in 2012/2013 to around 0.82 to 1.52 million tons.[45] A record-breaking harvest occurred in 2013/2014, with production estimated at 1.75 to 1.78 million tons.[10] Production fell by about half in 2014/2015 to around 0.82 to 0.96 million tons.[13] The 2015/2016 season saw a recovery, with production around 1.26 to 1.4 million tons.[13] Production dropped again in 2016/2017 to approximately 1.28 million tons.[15] In 2017/2018, production was slightly lower at around 1.25 million tons.[19] An increase was observed in 2018/2019, with production reaching around 1.55 million tons.[21] There was a slight decrease in 2019/2020.[25] Production increased significantly in 2020/2021 to around 1.38 to 1.4 million tons.[25] The 2021/2022 season saw a decrease to around 1.15 to 1.49 million tons.[26] Production dropped significantly in 2022/2023 to around 0.66 to 0.85 million tons.[47] Estimates for 2023/2024 suggest a recovery to around 0.76 to 0.85 million tons [47], and forecasts for 2024/2025 indicate a substantial increase to around 1.29 to 1.95 million tons.[32] Spain's consistent position as the top producer underscores its critical role in the global olive oil market, with its production volumes significantly influencing worldwide supply and price dynamics.

Spain is also a major consumer of olive oil, with high domestic consumption rates. In 2010, consumption was around 550,000 tons, with a per capita consumption of approximately 13.62 liters.[3] Between 2011 and 2012, consumption ranged from around 533,000 to 569,000 tons.[43] A slight decrease occurred in 2013, with consumption around 423,000 to 540,000 tons.[74] Between 2014 and 2019, consumption was around 518,000 to 604,000 tons.[75] In 2020, consumption increased to around 541,000 to 604,000 tons.[75] Around 523,000 to 580,000 tons were consumed in 2021/2022.[34] Consumption dropped significantly in 2022/2023 to around 300,000 to 363,000 tons.[60] Estimates for 2023/2024 suggest a slight recovery to around 402,000 tons [60], and projections for 2024/2025 indicate a further increase to around 460,000 tons.[60] While Spain has high per capita consumption, indicating a strong domestic demand, consumption levels can be sensitive to price fluctuations and competition from other edible oils, as evidenced by the significant drop in 2023 due to high prices.

Spain's olive oil market is also characterized by a strong export orientation, making it a key player in international trade.[77] A significant portion of its production is destined for export markets. There has been an increasing focus on pre-packaging olive oil for exports, suggesting an effort to enhance value and brand recognition.[80] Several factors influence Spain's olive oil sector. Climate conditions, including droughts, can significantly impact production volumes.[65] European Union agricultural policies play a crucial role in shaping the sector.[82] International trade dynamics, such as tariffs imposed by the United States on Spanish olive oil exports, can also have a considerable impact.[77] As an EU member, Spain's olive oil industry operates within the framework of EU regulations and trade relationships, which affects its production and export strategies.[30]

Comparative Analysis and Regional Trends:

Comparing the olive oil production trends across Tunisia, Italy, and Spain from 2010 to 2024 reveals distinct patterns. Spain consistently exhibits the highest production volumes, often exceeding 1 million tons annually. Italy follows, with production generally ranging between 200,000 and 600,000 tons. Tunisia's production is typically below 350,000 tons and demonstrates the highest degree of volatility, likely due to its reliance on rain-fed agriculture.

In terms of consumption, per capita consumption is generally highest in Spain and Italy, reflecting the integral role of olive oil in their diets. While both countries consume significant total volumes, Spain's consumption has shown greater sensitivity to price increases, particularly in recent years. Tunisia's domestic consumption is considerably lower compared to its production, underscoring its focus on the export market.

The olive oil market in the Western Mediterranean is highly interconnected. Spain acts as a major supplier to both Italy and the broader EU market. Italy's consistent consumption exceeding its domestic production creates a continuous demand within the region, often met by imports from Spain and Tunisia. Tunisia also plays a significant role as a supplier, particularly of bulk and increasingly organic olive oil. Market fluctuations in Spain, given its large production volume, tend to have ripple effects across the entire region and the global market.

Conclusion:

The olive oil production and consumption landscape in Tunisia, Italy, and Spain between 2010 and 2024 illustrates the complex interplay of environmental, economic, and cultural factors. Spain's dominance in production significantly influences global supply, while Italy remains a key consumer with a production sector facing challenges. Tunisia, with its fluctuating production and strong export focus, plays a vital role in supplying bulk and organic olive oil to the region. The interconnectedness of these three markets highlights the regional dynamics and the sensitivity of the olive oil industry to various internal and external pressures.

Year	Tunisia Production (Metric Tons)	Tunisia Consumption (Metric Tons)	Italy Production (Metric Tons)	Italy Consumption (Metric Tons)	Spain Production (Metric Tons)	Spain Consumption (Metric Tons)
2010	110,000 - 140,000	~30,000 - 50,000	548,000 - 550,000	660,000 - 675,000	1,370,000 - 1,400,000	550,000

2011	~120,000	N/A	477,000 - 510,000	660,000	N/A	N/A
2012	100,000 - 160,000	N/A	N/A	N/A	1,610,000 - 1,680,000	N/A
2013	220,000 - 260,000	~35,000	273,000 - 415,500	590,000 - 695,000	820,000 - 1,520,000	423,000
2014	320,000	~30,000 - 40,000	450,000 - 500,000	N/A	820,000 - 960,000	N/A
2015	320,000 - 350,000	N/A	300,000 - 328,000	N/A	1,260,000 - 1,400,000	N/A
2016	100,000 - 140,000	N/A	182,000 - 243,000	N/A	~1,280,000	N/A
2017	100,000 - 140,000	~35,000	428,000 - 486,000	N/A	~1,250,000	N/A
2018	240,000 - 300,000	N/A	~270,000	~557,000	~1,550,000	N/A
2019	120,000 - 130,000	~33,600	~365,000	589,000	N/A	604,000

2020	340,000 - 440,000	N/A	250,000 - 365,000	408,000	1,380,000 - 1,400,000	541,000 - 604,000
2021	~140,000	N/A	270,000 - 273,500	419,000	1,150,000 - 1,490,000	523,000 - 580,000
2022	180,000 - 240,000	N/A	~329,000	482,000 - 486,000	~666,000 - 1,500,000	N/A
2023	200,000 - 217,000	N/A	240,000 - 288,900	486,000	660,000 - 850,000	300,000 - 363,000
2024	~220,000	N/A	300,000 - 328,500	N/A	760,000 - 850,000	~402,000

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