



Taste it, enjoy it. it's olive oil.

| 24

MADRID, SPAIN
26-28 JUNE 2024

**Spanish National
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ICEX

#alimentosdespaña

**EL PAÍS
MÁS RICO DEL
MUNDO**



MINISTERIO DE AGRICULTURA, PESCA Y ALIMENTACIÓN

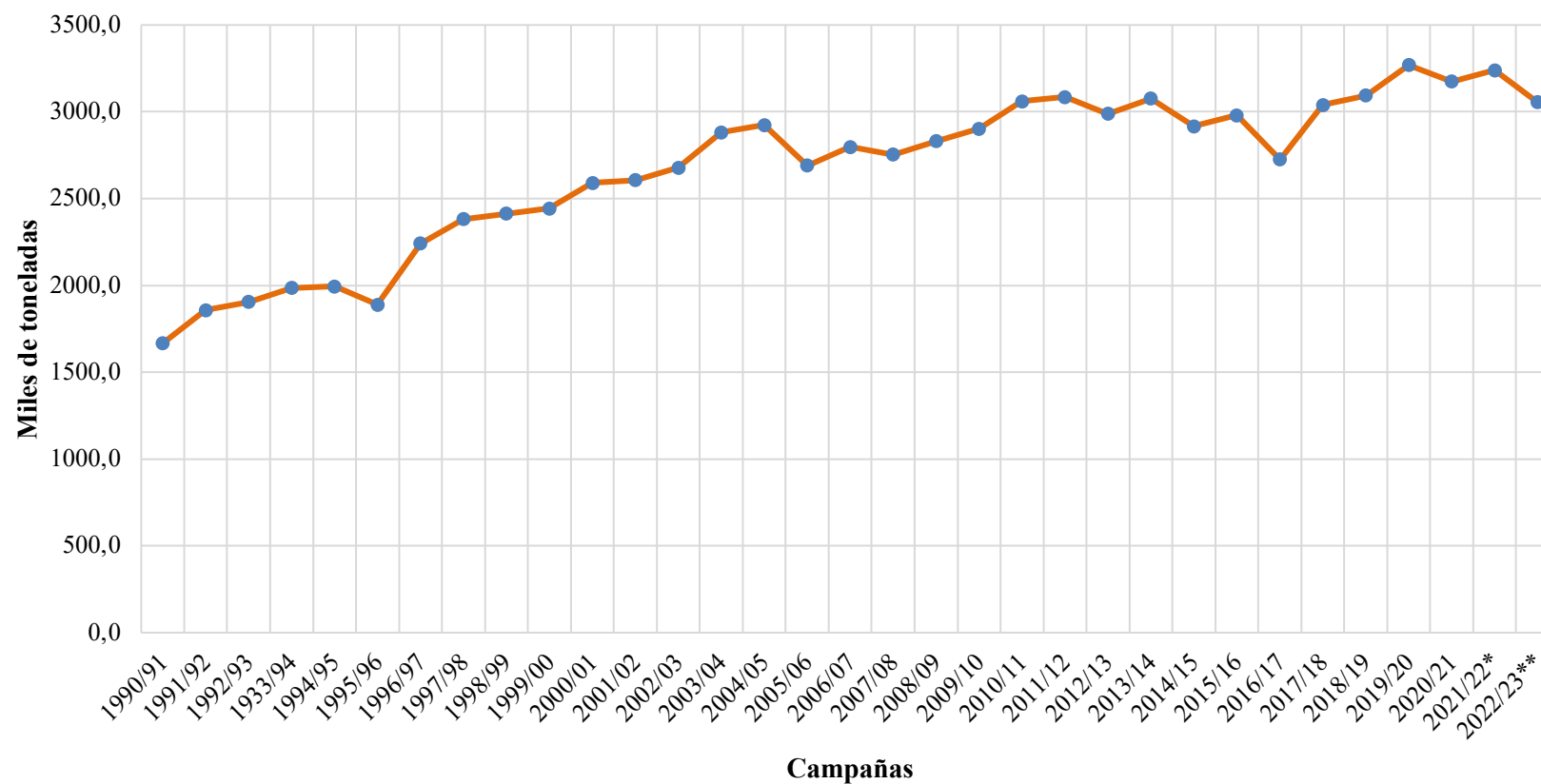
■ ANALYSIS OF CONSUMER STRATEGY IN BUSINESS DEVELOPMENT

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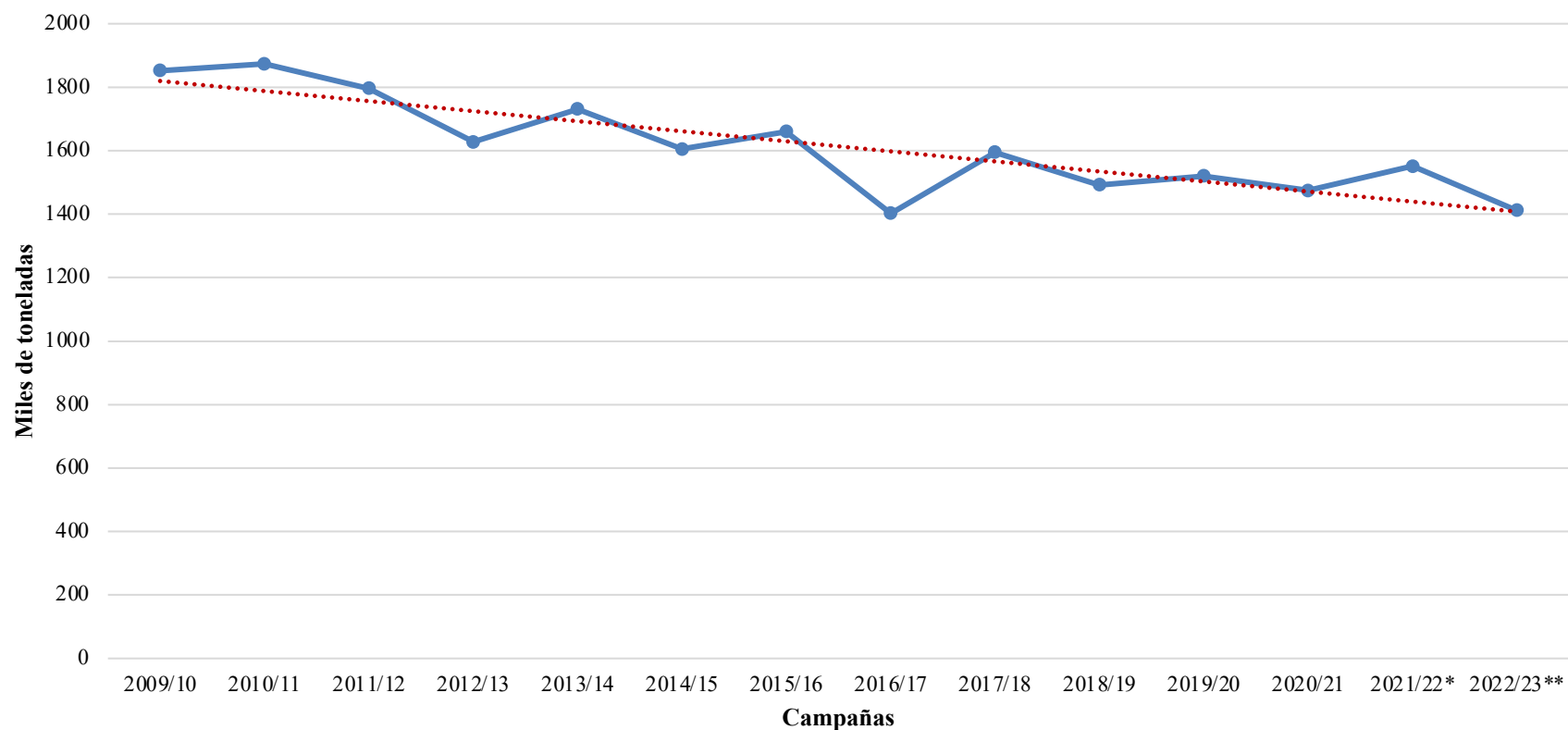
■ SUMMARY

- Evolution of global consumption of olive oils: a dual behavior
- key market segments to increase demand in major producing countries
- Analysis of consumer behavior and the attributes they value as a guide to strategies.

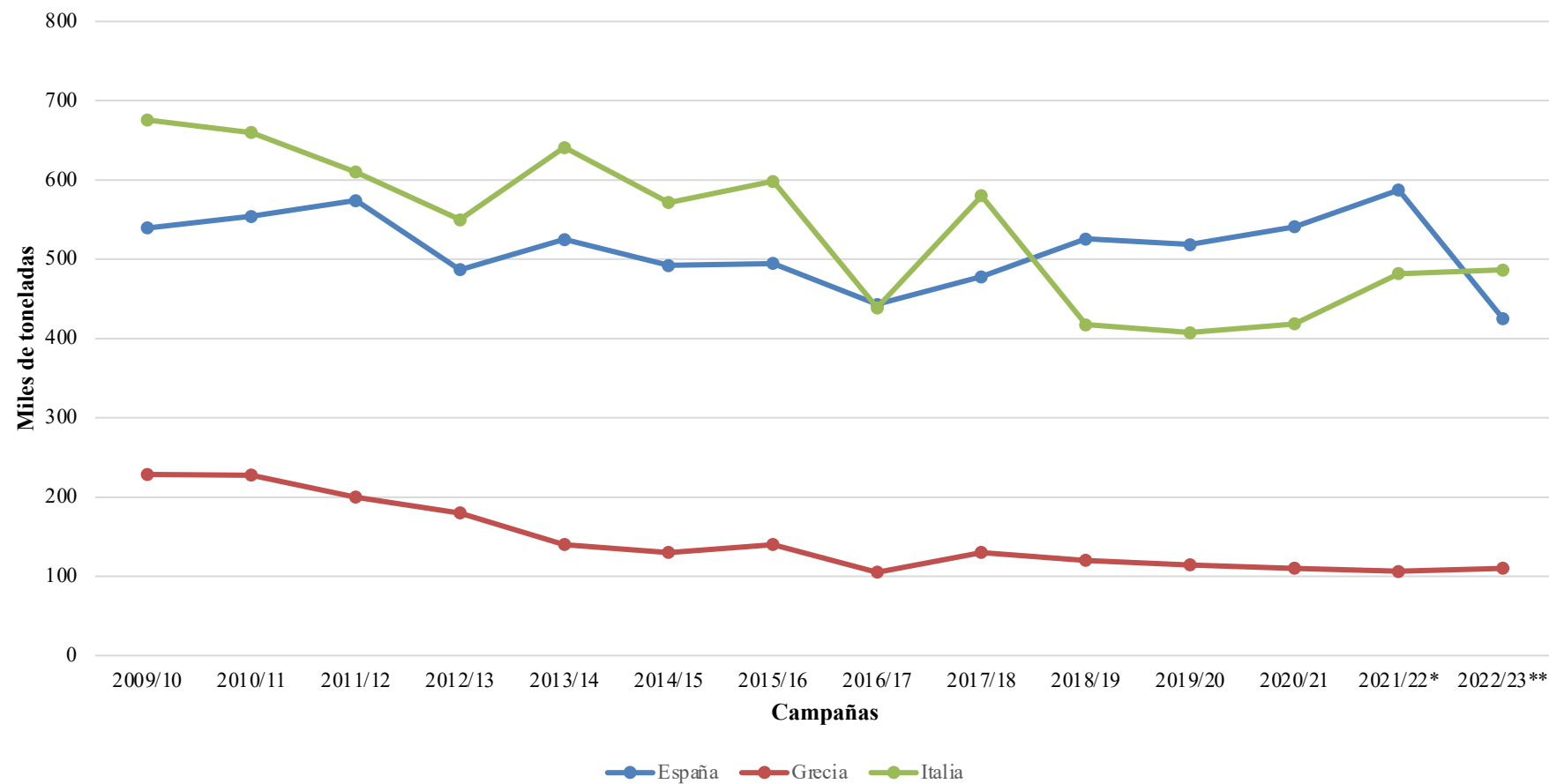
Analysis of consumer strategy in business development



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PAÍS/ CAMPAÑA	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
España	574,0	486,9	524,8	492,2	494,5	442,9	478,1	525,7	518,6	541,1	587,0
Grecia	200,0	180,0	140,0	130,0	140,0	105,0	130,0	120,0	114,3	108,6	105,5
Italia	610,0	550,0	641,1	571,7	598,1	438,9	580,0	417,3	407,6	421,9	453,6
Portugal	78,0	74,0	75,0	70,0	70,0	70,0	75,0	54,4	71,6	61,8	59,0
Alemania	61,0	60,5	66,0	64,2	62,7	60,9	61,0	62,7	75,7	82,0	74,2
Reino Unido	59,2	62,0	61,3	62,9	65,1	69,6	62,7	63,5	72,3	-	-
Suecia	8,4	8,3	10,0	9,7	10,6	9,6	9,6	10,0	12,5	13,2	12,3
Arabia Saudí	16,0	21,0	22,0	25,0	25,0	28,0	33,5	37,5	41,5	33,0	33,5
Australia	40,0	37,0	37,0	37,0	42,0	45,0	48,0	50,0	42,5	56,0	50,0
Brasil	68,0	73,0	72,5	66,5	50,0	59,5	76,5	86,0	104,0	106,5	103,5
Canadá	39,5	37,0	40,5	37,5	41,0	39,5	47,0	46,5	57,5	58,0	53,5
China	40,0	39,0	32,0	33,5	39,0	44,0	44,0	51,5	57,5	53,0	57,5
EE.UU.	300,0	287,0	301,5	295,0	321,0	315,0	315,0	351,0	402,5	389,0	412,0
Japón	43,0	51,0	54,0	59,0	53,5	54,5	55,5	69,0	69,5	59,0	62,5
México	11,5	14,0	14,0	15,5	14,5	14,0	15,0	15,0	17,0	19,0	22,5
Suiza	13,5	13,5	13,5	14,0	14,5	14,5	14,5	15,0	18,0	18,0	18,0
Taiwán	5,0	6,0	8,5	8,0	6,5	6,5	7,5	8,0	9,5	10,5	13,0
TOTAL	3085,8	2989,4	3075,4	2916,2	2979,9	2726,2	3038,9	3093,2	3268,6	3177,5	3329,0

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Spain. Campaign 2001/02: 631,2 (587,0) (7%)

Italy. Campaign 2005/06: 848,2 (453,0) (46,6%)

Greece. Campaign 2004/05: 283,0 (105,5) (62%)

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PAÍS/ CAMPAÑA	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
España	12,27	10,44	11,29	10,60	10,64	9,51	10,23	11,17	10,95	11,41	12,33
Grecia	18,11	16,42	12,85	12,01	12,99	9,76	12,12	11,20	10,68	10,36	10,06
Italia	10,25	9,13	10,55	9,41	9,87	7,25	9,60	6,92	6,86	7,08	8,18
Portugal	7,42	7,08	7,21	6,76	6,78	6,80	7,29	5,30	6,95	5,81	6,07
Alemania	0,76	0,75	0,81	0,79	0,76	0,74	0,74	0,75	0,91	1,00	0,81
Reino Unido	0,93	0,97	0,95	0,97	0,99	1,05	0,94	0,95	1,08	-	-
Suecia	0,88	0,86	1,03	0,99	1,07	0,95	0,94	0,97	1,21	1,28	1,13
Australia	1,76	1,60	1,58	1,55	1,74	1,83	1,92	1,97	1,65	2,18	1,92
Brasil	0,34	0,36	0,36	0,33	0,24	0,29	0,37	0,41	0,49	0,50	0,47
Canadá	1,14	1,05	1,14	1,05	1,14	1,08	1,27	1,24	1,51	1,52	1,37
EE.UU.	0,96	0,91	0,95	0,92	0,99	0,97	0,96	1,07	1,21	1,17	1,19
Japón	0,34	0,40	0,42	0,46	0,42	0,43	0,44	0,55	0,55	0,47	0,50
Suiza	1,69	1,67	1,65	1,69	1,73	1,72	1,70	1,75	2,08	2,07	2,00

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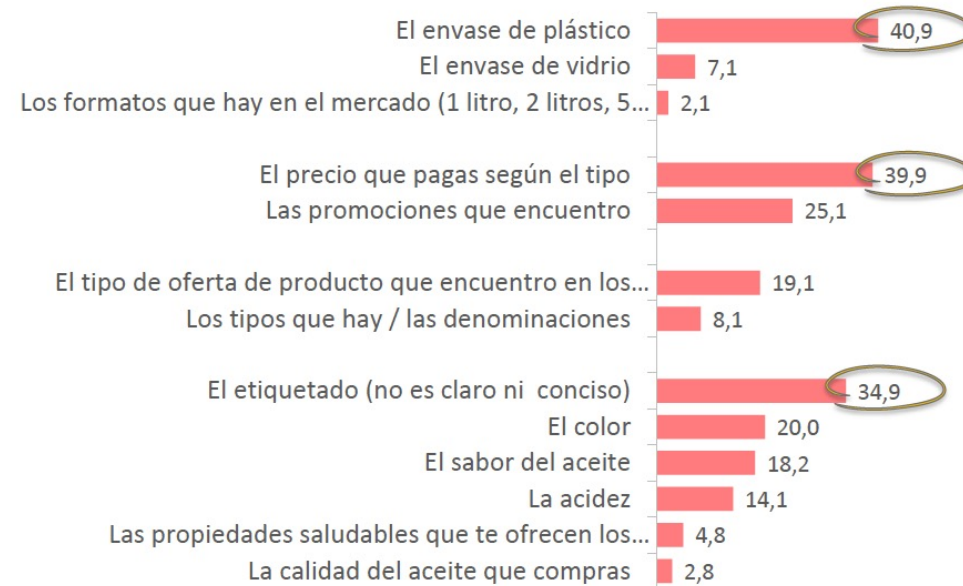
PER CAPITA CONSUMPTION BY AGE INTERVALS IN SPAIN									
AGE	OLIVE OIL (in l)			VIRGIN OLIVE OIL (in l)			EXTRA VIRGIN OLIVE OIL (in l)		
	2021	2022	2023	2021	2022	2023	2021	2022	2023
National Average	4,01	3,60	3,20	0,71	0,67	0,66	3,00	2,99	2,25
—35 years old	1,90	1,30	1,05	0,40	0,40	0,30	1,30	1,00	0,81
From 35 to 49	2,40	2,00	1,67	0,50	0,40	0,45	1,90	1,70	1,27
From 50 to 65	4,50	4,10	3,55	0,80	0,80	0,72	3,10	3,40	2,59
65 years and older	7,30	7,00	6,50	1,20	1,10	1,11	5,60	5,80	4,22

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El **envase** de plástico y el **precio** del aceite los principales frenos de los más insatisfechos
El **etiquetado** también es un aspecto a mejorar ya que es “clave” para diferenciar los tipos de aceite

Aspectos en los que **NO ESTAN SATISFECHOS**:

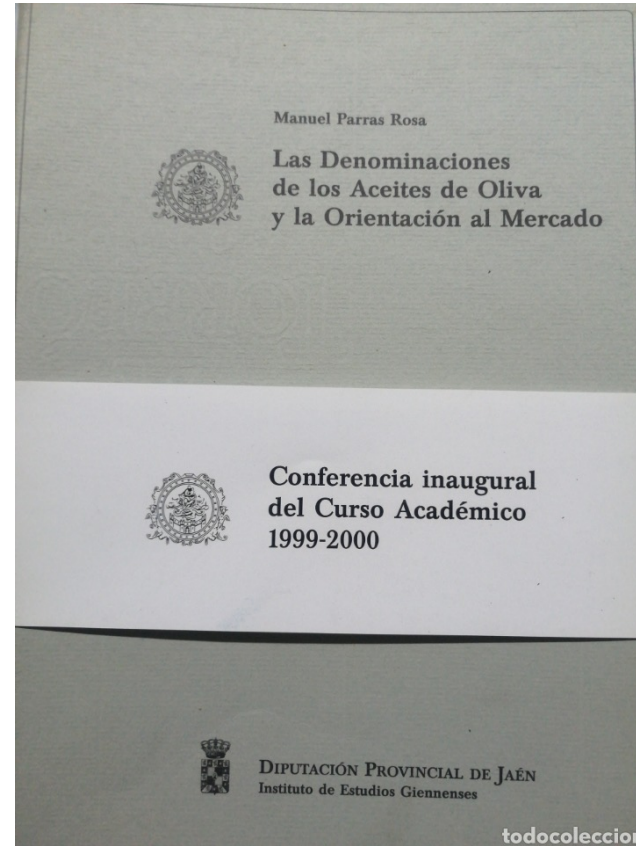
% de respuestas sugeridas de compradores que han empeorado la imagen del aceite y valoran mal el aspecto (1+2) (n=47)



6,5% Ha
empeorado la
imagen



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Ítem	True	Fake	Dnk/Na
1. Olive oil is pure olive juice	45,7	39,4	15,0
2. Olive oil is a blend of virgin and refined	30,4	33,5	36,1
5. The main factor to differentiate between qualities of olive oils is acidity.	50,0	24,0	25,8

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Received 24 June 2013
Revised 30 October 2013
Accepted 5 November 2013

Designations and consumer perceptions

An experimental study and implications for agricultural policy

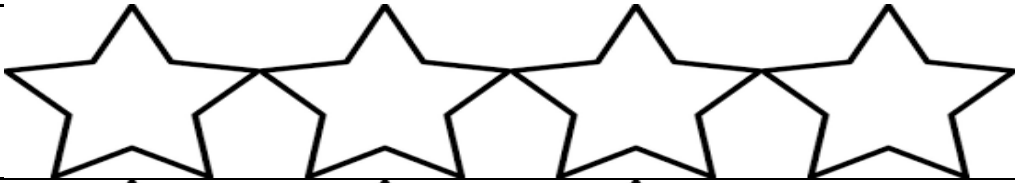
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ACEITE DE OLIVA VIRGEN EXTRA	
ACEITE DE OLIVA VIRGEN	
ACEITE DE OLIVA	

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Article

Do Chefs Value Health in Their Olive Oil Purchasing Decisions?

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Usage Setting→	Kitchen			Dining Room		
↓Criteria/Quality→	EVOO	VOO	OO	EVOO	VOO	OO
Flavour	78.44	80.80	75.62	79.73	85.60	81.59
Confidence in supplier	23.21	27.20	17.41	22.22	24.00	17.42
Price	32.67	41.60	39.80	31.04	39.20	35.33
Brand	7.19	10.40	3.99	7.19	11.20	4.49
Olive variety	13.73	13.60	12.94	13.06	15.20	9.96
Area of origin	19.28	16.80	16.92	16.34	15.20	15.43
Organic	1.64	0.80	0.00	1.96	0.80	0.00
Health	1.31	0.80	1.00	0.65	0.00	0.00
Protected Designation of Origin (PDO)	0.98	1.60	1.50	1.63	1.60	1.50
Quality certificates/awards	14.05	8.80	15.42	13.40	8.80	15.42
Other	20.91	16.0	17.91	18.95	15.20	17.91

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JAÉN
Más de lo que lees

JAÉN **CAJAS** **ALBARRACÍN**
Vino, aceite, rabo, avellanas, miel, queso y productos de primera calidad

En colaboración con

MANUEL PARRAS ROSA - JUAN CARLOS RODRÍGUEZ COHARD
RAMÓN LANZAS MOLINA
CÁTEDRA CAJA RURAL DE JAÉN JOSÉ LUIS GARCÍA-LOMAS HERNÁNDEZ
DE ECONOMÍA, COMERCIALIZACIÓN Y COOPERATIVISMO OLEÍCOLA

En un estudio reciente de la Interprofesional del Aceite de Oliva Español sobre el consumo de aceites de oliva en la denominada "restauración colectiva", se señala que en los tres

nuestras residencias de mayores, en el ejército y en los comedores escolares, solo se utilizan aceites de oliva, aunque mucho nos tememos que no, a la vista de los datos del referido estudio. La Administración pública, si así lo hiciera, además de ofrecer unos productos saludables a la población podría de paso educar a los niños en una ingesta más equilibra-

Sería deseable y oportuno que Andalucía liderase este movimiento en pro del consu-



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Intrinsic attributes: flavor –intense, smooth, etc.-, color –green, yellow-green, etc.-, aroma, origin –PDO, PGI-, production method –ecological, from integrated agriculture, biodynamic- , nutritional qualities, variety –picual, arbequina, hojiblanca, royal, etc.-, carbon footprint, water footprint, health, etc.

Extrinsic attributes: brand, price, point of sale, packaging – silent seller –, certifications – ISO, BRC, Nature Choice, IFS, etc.

Hidden attributes: respect for the environment, food security as a process and not a result, biodiversity, business ethics, job creation, contribution to rural development, landscape maintenance and heritage, the maintenance of the population in the territory, fair trade, etc. **Increased EVOO or ethical EVOO.**



*Taste it, enjoy it.
it's olive oil.*

Thank you!

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