

## **DG AGRI WORKSHOP**

### **TRATTATIVE CONTRATTUALI NEL SETTORE DELL'OLIO DI OLIVA**

**BRUXELLES 10 SETTEMBRE 2014**

## Economic actors of the olive oil food chain

### Farmers

About 780.000 for an olive tree area of 1.1 mio ha, corresponding to an average agriculture holding dimension of 1.5 ha.

Processing of the olives could be done by:

- a coop;
- a "private" oil mill to which olives have been sold;
- a "private" oil mill which is paid for the processing, olive oil being the farmers property;
- a "private" oil mill, which also sells the olive oil on behalf of the farmer.
- after the olives have been sold to traders

### First processing industry (oil mills)

Oil mills produce different types of olive oils and some have a bottling chain (about 4.800).

### Pomace oil extractors

Extract pomace oil from virgin olive residues. Some have refining plants to transform crude oil into refined pomace oil (approximately 40 structures).

### Refining industry

These firms are mainly refining lampante and olio di sansa (about 10).

### Grossisti/intermediari

Represents individuals who select and buy oil, both in Italy and abroad, and then make the blend to be sold to businesses of secondary processing (approximately 35).

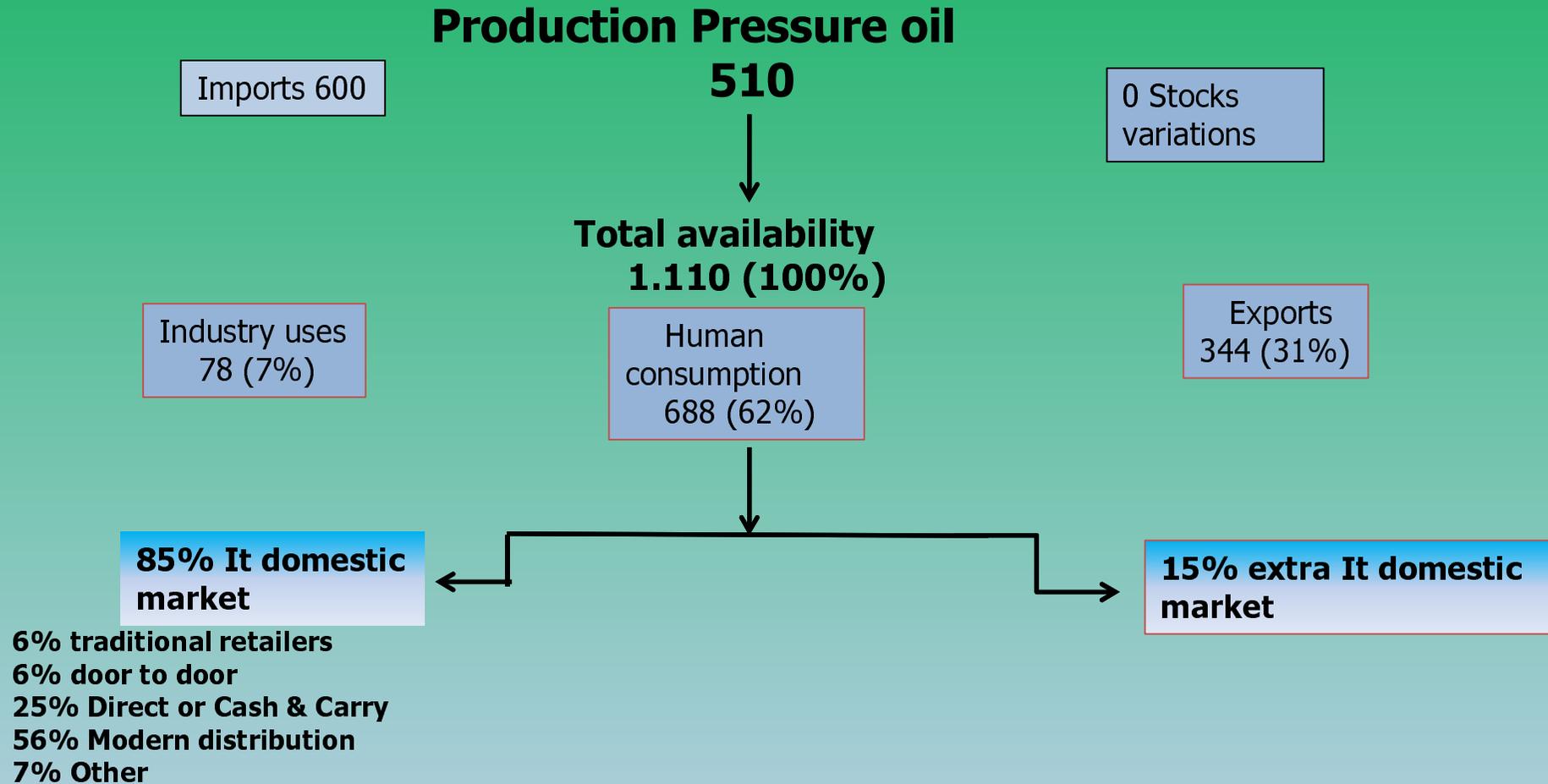
### Second processing industry

Big firms, buying the olive oil on the market and manufacturing/ bottling it.

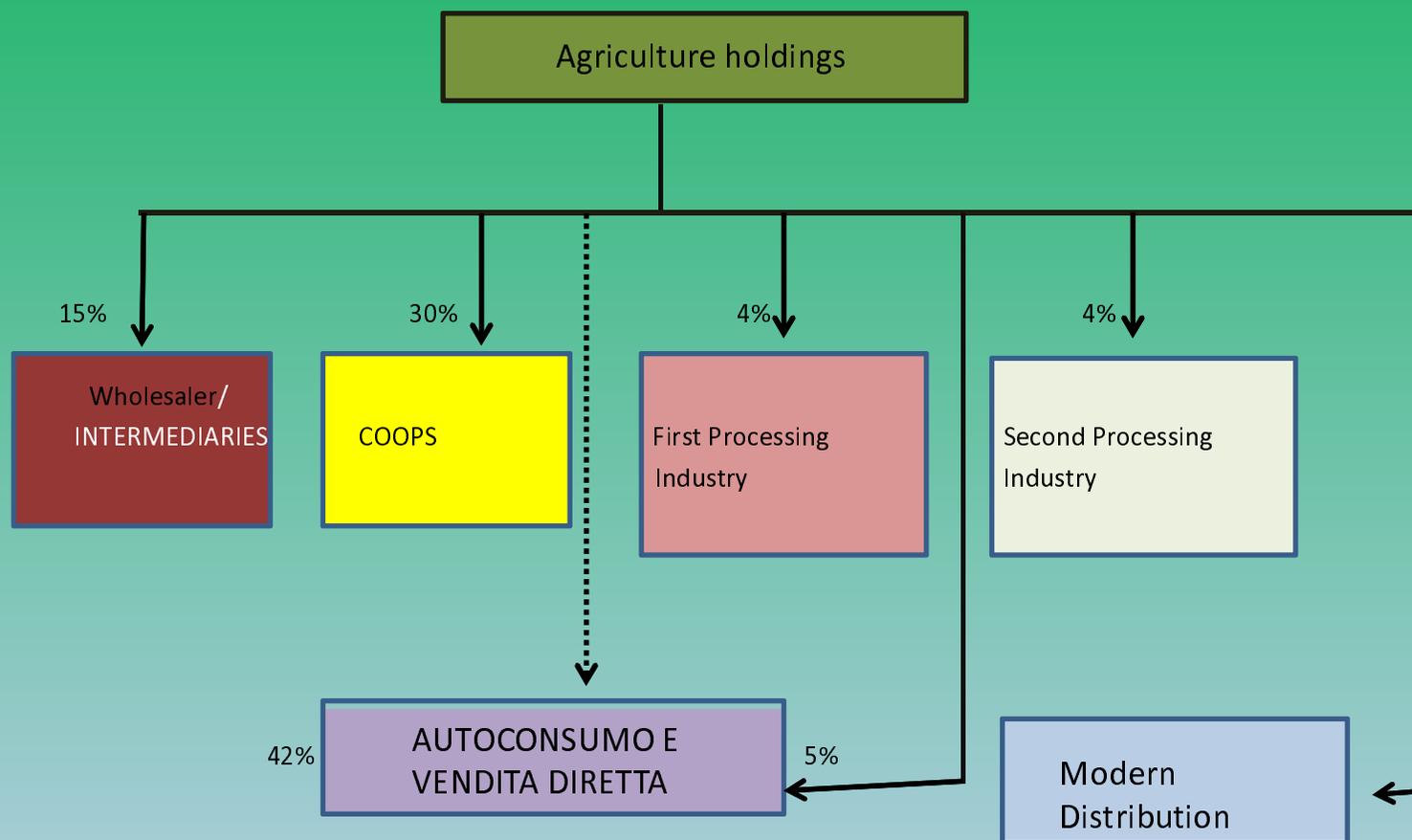
### Modern distribution

Represents the marketing phase of the olive oil. Represent 70% of the olive oil sold at retail level.

# Production flows in the olive oil chain – last 3 marketing years(000 T)



# FLUSSI DELLE AZIENDE OLIVICOLE % SULLE QUANTITA'



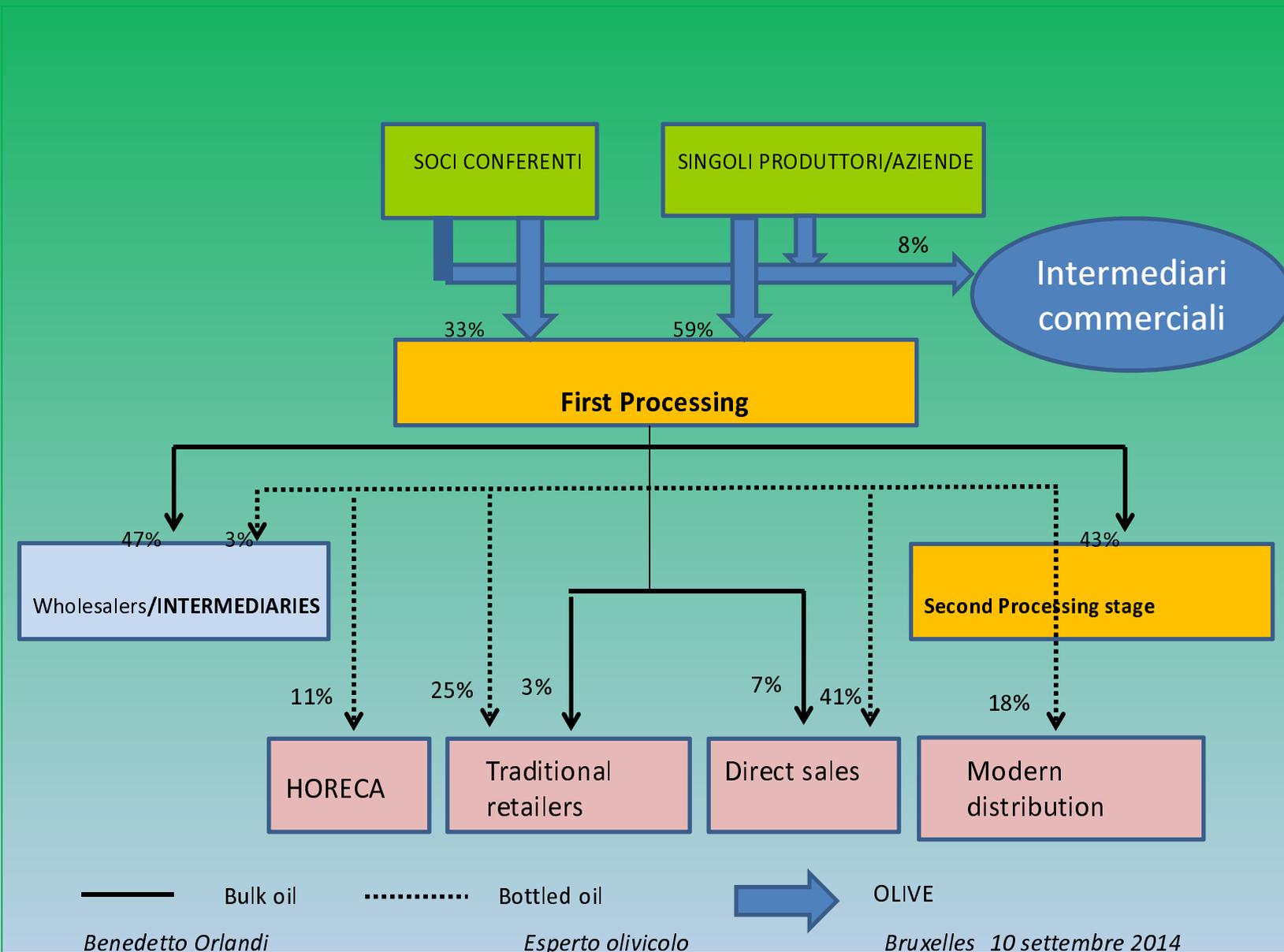
— OLIO SFUSO    ..... OLIO CONFEZIONATO

*Benedetto Orlandi*

*Esperto olivicolo*

*Bruxelles 10 settembre 2014*

## FLUSSI DELLE AZIENDE DI PRIMA TRASFORMAZIONE '% SULLE QUANTITA'



## PREVISIONI D'IMPATTO DELLE TRATTATIVE CONTRATTUALI SUL MERCATO ELABORATE DALLE ORGANIZZAZIONI DEI PRODUTTORI

- Currently most of the Producers Organisations are not organised to carry out the activities listed in Art. 169 of Reg.(EU) N.1308/2013.
- The current minimum number of members and/or minimum volume of production for a PO is too low to support/increase the competitiveness of agricultural holdings.
- Implementing this article for the Italian producer organisations will therefore be difficult.
- A thorough review of the Italian approach will be necessary to implement Art. 169 of Reg 1308(2013).
- For Italy it would be important that the implementing regulations made clear the requirements in terms of minimum number of producers and minimum volume of production placed on the market.