

OLİVE AND OLİVE OİL SEKTÖREL REPORT

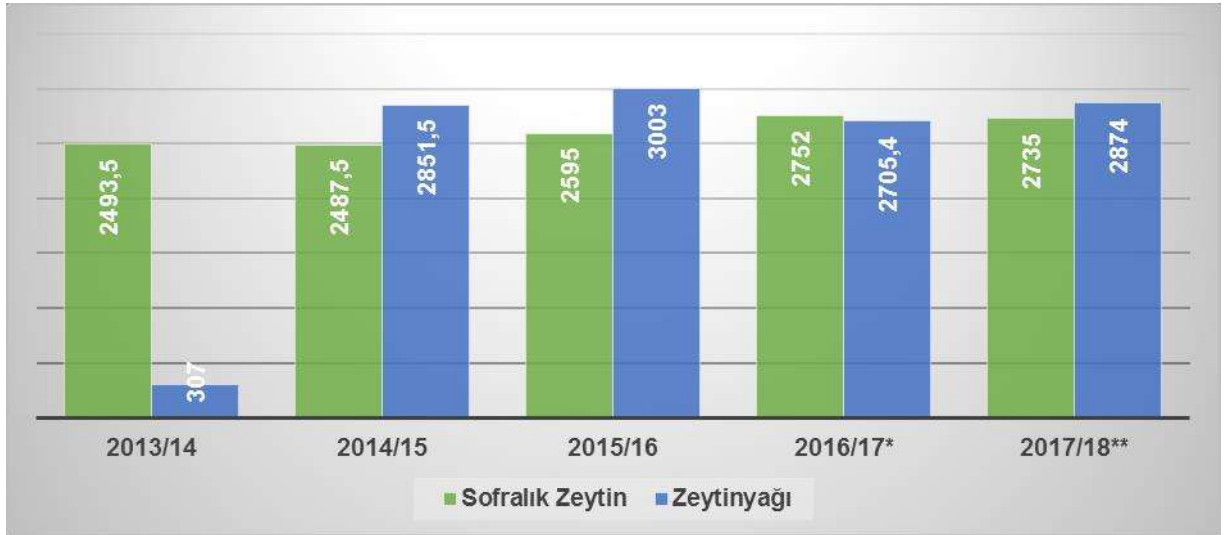
The number of patients with cardiovascular diseases, obesity and especially cancer is on a rising trend all over the world. This situation leads to a rapid increase in the search and awareness about healthy and balanced nutrition.



The importance of "Mediterranean Type Nutrition", which comes to the forefront in terms of healthy and balanced nutrition, is understood more and more every day. The most important factor that makes this type of nutrition vital and valuable for health is undoubtedly that olive and olive oil are the crown jewels of this cuisine.

Therefore, the interest and demand for olives and olive oil will increase rapidly in the upcoming period.

Graph 1: Olive and Olive Oil Consumption in the World
(Thousand tons)



Source: Uluslararası Zeytin Konseyi, (*Prediction, ** Prescience)

Our country is among the luckiest countries in the world in olive production with its geographical location, climate and soil characteristics.

Of the 900 million olive trees on an area of approximately 9 million hectares worldwide, 98% are in the Mediterranean basin. In the last 5 years, the average olive oil production in the world has been approximately 2.85 million tons.

Spain, Italy, Greece, Portugal, Turkey, Tunisia and Syria are among the most important olive oil producing countries in the world.

The provinces with the highest olive production in our country are listed as Aydın, İzmir, Muğla, Balıkesir, Bursa, Manisa, Çanakkale, Gaziantep and Mersin.

T.R. In the 2017 Olive and Olive Oil Report published by the Ministry of Commerce, General Directorate of Cooperatives;

- ☞ The number of olive trees in our country, which was 100 million at the beginning of the 2000s, increased to approximately 174 million in the 2016/17 season,
- ☞ Total olive production in 2016/17 was 1 million 730 thousand tons, with the average of olive oil production of the last 5 years being approximately 159 thousand tons, the average production of table olives being 420 thousand tons, and the production of olives for oil being 1 million 300 thousand tons,
- ☞ It has been stated that there are approximately 320 thousand olive-growing family businesses in Turkey.

The olive production of our country for the last 5 years has been increasing except for 2015. According to the data of the Ministry of Agriculture and Forestry, 2.1 million tons of olives were produced in 2017.

Graph 2: Turkey's Olive Production in the Last 5 Years (Thousand Tons)



Soruce: T.C. Tarım ve Orman Bakanlığı

Olive and olive oil have great potential in the export of agricultural products in our country. In 2017, our country exported 323 million dollars of olive and olive oil.

The USA, Spain and Germany are among the biggest export markets of our country.



İzmir in the Olive and Olive Oil Sector

İzmir, the leading city of agriculture, has values above Turkey's average in olive and olive oil production and export, as in many agricultural products.

Our city contributes significantly to our national income with the production and export of olive and olive oil, which is our national value.

In 2017, table olives worth 233,022,000 TL and olive oil worth 1,044,540,000 TL were produced in our city.

In 2017, 38,837 tons of table olives and 298,440 tons of olives for oil were produced in İzmir.

Table 1: İzmir Olive Production Data

	Kapladığı Alan (da.)	Fruiting Tree Number	Non-Fruiting Tree Num.	Yield (kg/tree)	Product (ton)	Value (TL)	Avarage Sell Price (Kr/kg)
Olive for Table	106.099	1.652.077	665.533	24	38.837	233.022.000	600
Olive for Oil	868.533	15.051.731	2.215.263	20	298.440	1.044.540.000	350
						1.277.562.000	

Source: İzmir İl Tarım ve Orman Müdürlüğü, Meyve Üretim Değerleri, <https://izmir.tarim.gov.tr/Menu/88/2017-Yili>

İzmir is in the leading position in Turkey in the export of olives and olive oil. In 2017, our city's olive and olive oil exports increased by 215% and reached 157.7 million dollars.

Thus, our city has taken a leading position by shouldering nearly half of the total olive and olive oil exports of our country.

Table 2: Export Data as of 31.12.2017
(1000 \$)

		1 Jan. - 31 Dec.		
		2016	2017	Change
Olive and Olive Oil	İZMİR	50.160,04	157.706,84	214,41%

Source: Türkiye İhracatçılar Meclisi <http://www.tim.org.tr/tr/ihracat-rakamlari.html>

Our exports are increasing day by day. İzmir was the country in the first two quarters of 2018. has maintained its leadership in olive and olive oil exports across the country.

Our city continues to maintain a successful performance by exporting more than 107 million dollars with an increase of 28.84% compared to the same period of the previous year.



Table 3: Export Data as of 30.06.2018

		1 Jan. - 30 June		
		2017	2018	Change
Olive and Olive Oil	İZMİR	83.104,93	107.072,80	28,84%

Source: Türkiye İhracatçılar Meclisi <http://www.tim.org.tr/tr/ihracat-rakamlari.html>

Problems of the Olive and Olive Oil Sector and Suggestions for Solutions

T.R. 2017 Olive and Olive Oil of the Ministry of Commerce, General Directorate of Cooperatives
In his report, the main problems and solution suggestions in olive and olive oil production are summarized;

Due to the fact that yield estimation studies are based only on the experience and observations of experts, it is not possible to create a geographic information system and reliable database: Yield studies should be carried out with the use of modern technologies as well as experts.

The high annual effect (periodicity) in our country: Olive varieties breeding studies should be carried out and production methods should be modernized. For example, while there is a yield loss of 75% during the absence years in our country, this rate is around 35-40% in Spain.

Misdirections and preferences in sapling production: Sapling production should be increased, breeding studies should be carried out, olive sapling types should be classified, certified saplings should be used and genetic map of seedlings should be drawn.

Insufficient fertilization – spraying and incorrect technical applications: Fertilization should be done at an adequate level and based on analysis, and the number of regional laboratories should be increased. By expanding the spraying areas, it should be ensured that drugs that are harmless to the environment and human health are preferred.

Insufficient irrigation and erosion: 92% of the olive lands are not irrigated, and modern irrigation techniques should be applied by ensuring the use of idle water resources. Terracing works should be accelerated to prevent erosion.

Wrong pruning-picking methods, wastage problem, storage and low yield: In Spain and Italy, the yield per tree is 45-50 kg. In our country, the productivity is one-third of these rates. Pruning and harvesting techniques should be reviewed, work should be done on rejuvenation of trees, mechanical harvesting should be expanded, the number and quality of storage facilities should be increased and modernized.

Waste from olive oil plants: The environmental damage of olive black water wastes of olive oil enterprises should be eliminated with modern treatment plants.



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Effective studies should be carried out to increase branding and packaged sales, to strengthen the international image of Turkish brands, to increase domestic consumption, to prevent adulteration and fraudulent mixed oil sales.



Olive oil also has an important potential in terms of pharmaceutical, alternative medicine and cosmetics sectors. The added value created by the sector will increase much faster with the increase of investment in these areas.

The olive and olive oil sector continues to increase its contribution to our national income. It is clearly seen that this contribution will increase with the solution of sectoral problems, increasing the added value in production and branding.

Sources:

- 2017 Yılı Zeytin ve Zeytinyağı Raporu, T.C. Ticaret Bakanlığı Kooperatifçilik Genel Müdürlüğü, 2017
- İzmir İl Tarım ve Orman Müdürlüğü, Meyve Üretim Değerleri, <https://izmir.tarim.gov.tr/Menu/88/2017-Yili>
- Ülke Profilleri-Türkiye, Uluslararası Zeytin Konseyi, <http://www.internationaloliveoil.org/estaticos/view/136-country-profiles>
- Türkiye İhracatçılar Meclisi, <http://www.tim.org.tr/tr/ihracat-rakamlari.html>
- T.C. Tarım ve Orman Bakanlığı, Bitkisel Üretim Verileri, <https://www.tarim.gov.tr/sgb/Belgeler/SagMenuVeriler/BUGEM.pdf>