

The international olive sector: challenges in the face of climate change

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A living testimony to the ancient and contemporary history of civilisations, olive growing continues to attract growing interest, driven by its social, economic and environmental dimensions. Able to adapt to a wide range of climatic and soil conditions, olive trees now cover almost 11 million hectares. Predominantly present in the Mediterranean basin, where it accounts for almost 80% of olive groves, it has gradually crossed its traditional borders to establish itself across the world: from California and South America (Argentina, Uruguay, Peru, Chile) to Australia or India, and as far afield as China.

In terms of international trade, almost a third of the world's olive oil resources are traded. World olive oil production is on an upward trend, despite inter-annual variations. It rose from an average of 2.1 million tonnes in the 1990s to 3.1 million tonnes in 2010, an increase of 48%, before levelling off. After two crop years that produced below average yield levels, the current crop year has seen a rebound to almost 3.4 million tonnes. This variability, which is largely due to the increased frequency of droughts, has been accompanied by an unprecedented rise in prices.

The expansion of markets beyond the Mediterranean basin has led to a sharp rise in olive oil exports, from 400,000 tonnes in the 1990s to over a million tonnes in recent years. Imports are following a similar trend. In the current year, seven markets account for around 80% of world imports of olive oils and virgin olive oils: the United States (35%), the European Union (17%), Brazil (8%), Japan (6%), Canada (5%), China (4%) and Australia (3%).

Considered a pillar of the Mediterranean diet, olive oil is distinguished by its high oleic acid and polyphenol content, endowing it with significant anti-inflammatory and antioxidant properties. According to numerous scientific studies, these characteristics contribute to the protective effects of the Mediterranean diet on cardiovascular health and have largely contributed to the expansion of its consumption worldwide.

The producer countries remain the main consumers of olive oil. Italy consumes 30% and Spain 20% of world production. The European Union remains the leading consumer market, accounting for 71% of global demand. The United States, with 8%, is following a steady upward trend, becoming a strategic market with great potential, especially as it imports almost all of its consumption. However, the emergence of new producer countries raises questions regarding their ability to compete with the sector's two historic leaders.

Climate change is increasing the frequency of extreme weather events, particularly in the Mediterranean basin, which has been identified as a climate hotspot. Drought, desert-

ification and water scarcity are affecting olive growing and compromising yields. At the same time, new diseases and pests are emerging, such as verticillium wilt, the olive fly or the *Xylella fastidiosa* bacterium, threatening the sustainability of traditional olive groves.

Yet the olive tree is also recognised as an ally in the fight against climate change. Resilient, adaptive and able to survive in difficult conditions, it is the most widely cultivated woody species in the world and acts as an effective carbon sink. Its contribution to sustainability is based on the dual principles of adaptation and resilience. Technological innovations and developments in cultivation techniques now offer ways of optimising resources, particularly water, while increasing productivity. This has encouraged the development of intensively cultivated olive groves, particularly in Spain, Portugal and Italy, and, more recently, in Türkiye, Morocco and Tunisia, with the adoption of better adapted varieties and the mechanisation of operations.

The International Olive Council recently launched an initiative to assess the olive tree's potential access to voluntary carbon credit markets, consolidating its role as a strategic crop in the face of climate change. At a time when the international community is moving towards carbon neutrality by 2050, this initiative should be encouraged and supported in order to strengthen its feasibility and credibility.

Faced with these challenges, a renewed dialogue on the future of olive oil is essential. Its role as a vector for virtuous agricultural practices and environmental sustainability makes it a key sector for the years to come. This vision must be based on three fundamental pillars:

1. Produce more, sustainably, in a globalised world by facilitating trade, defending quality and authenticity standards, and protecting consumers;
2. Promote olive oil's unique contribution to human health;
3. Value its role in global health, to ensure the sustainability of the sector and the preservation of biodiversity.

The future of olive growing lies in its ability to combine tradition and innovation, local resilience and global dynamics. Faced with the climatic, nutritional and economic challenges of the 21st century, the olive tree is a powerful symbol of continuity and adaptation. Strengthening collective efforts to support this strategic sector, at the intersection of science, culture and the environment, is an imperative for the years to come.