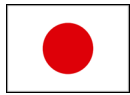


The Japanese Olive Oil Market and the contribution of Sicily

Yuko Okuma, Yuko Edizioni – EXPO 2015

Yuko Edizioni – EXPO 2015, 16 Oct, 2015



Key data on the Japanese Olive Oil Market 2014

- *A record 63 million litres achieved*
- *An outstanding +11% average volume growth 2009/14*
- *An even higher +16% average volume growth estimated for 2014/2016*
- *US\$285m of retail market value*
- *About US\$600m of total market value**



Yuko Edizioni – EXPO 2015, 16 Oct, 2015

*at consumer / user price (retail-Food Service)

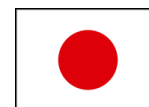
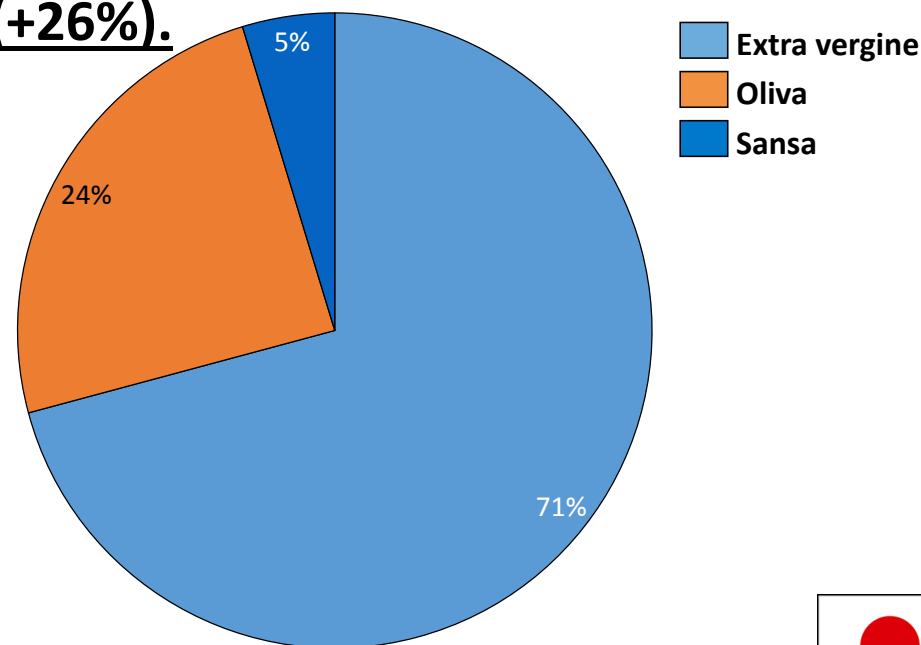
The Japanese Olive Oil Market - imports 2014: breakdown by type

- In 2014, Japan imported a record 58k tons of Olive Oils, for 63m litres, with Extra Virgin by far the most representative type, with a 71% volume share. Olive Oil is a strong no 2 with 24% share in volume, and Pomace Olive Oil for 5%.
- Import value stands at approx €212 m (+26%).

Extra-vergine tons	40.832
Olio d'Oliva "	14.102
Olio di Sansa "	2.701
totale tons	57.636
totale m litri	63,1

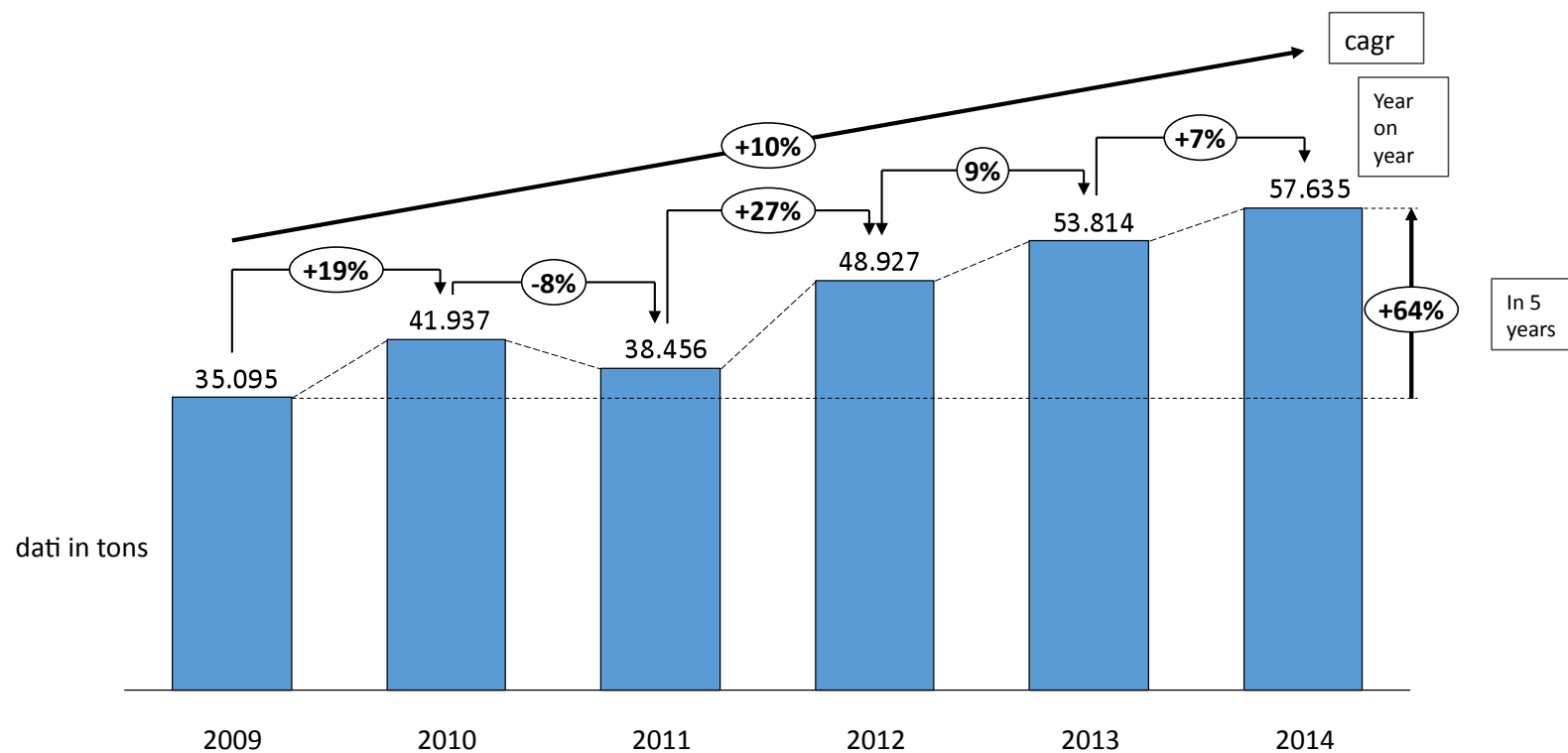
Official data Ministry of Finance Japan

Yuko Edizioni – EXPO 2015, 16 Oct, 2015



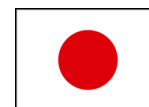
The Japanese Olive Oil Market – trend of imports 2009/14: tons

- **Also in 2014 there is strong growth in Japan for Olive Oil.**



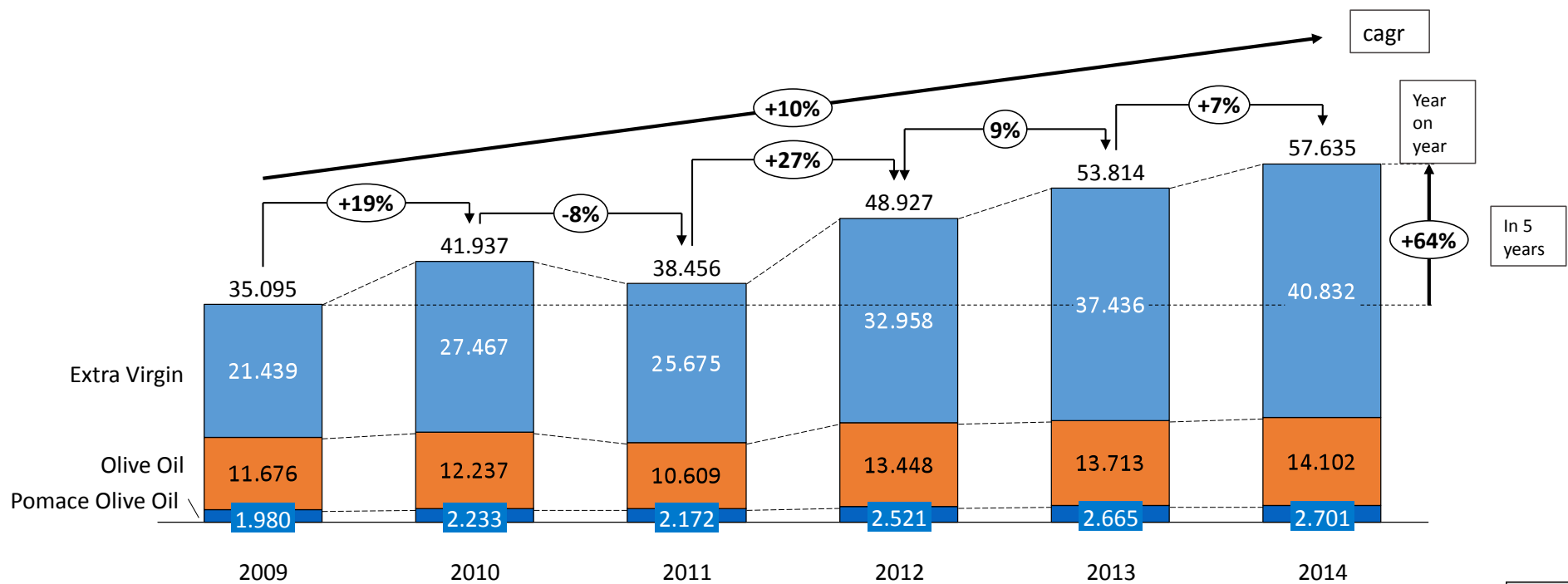
Yuko Edizioni – EXPO 2015, 16 Oct, 2015

Official data Ministry of Finance Japan



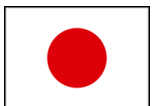
The Japanese Olive Oil Market – trend of imports 2009/2014. Breakdown by type –data in tons.

- **Strong growth for Extra Virgin that brings most of the growth in the market**
- **Also relevant Olive Oil that shows continuous growth in the period.**

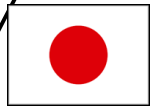


Yuko Edizioni – EXPO 2015, 16 Oct, 2015

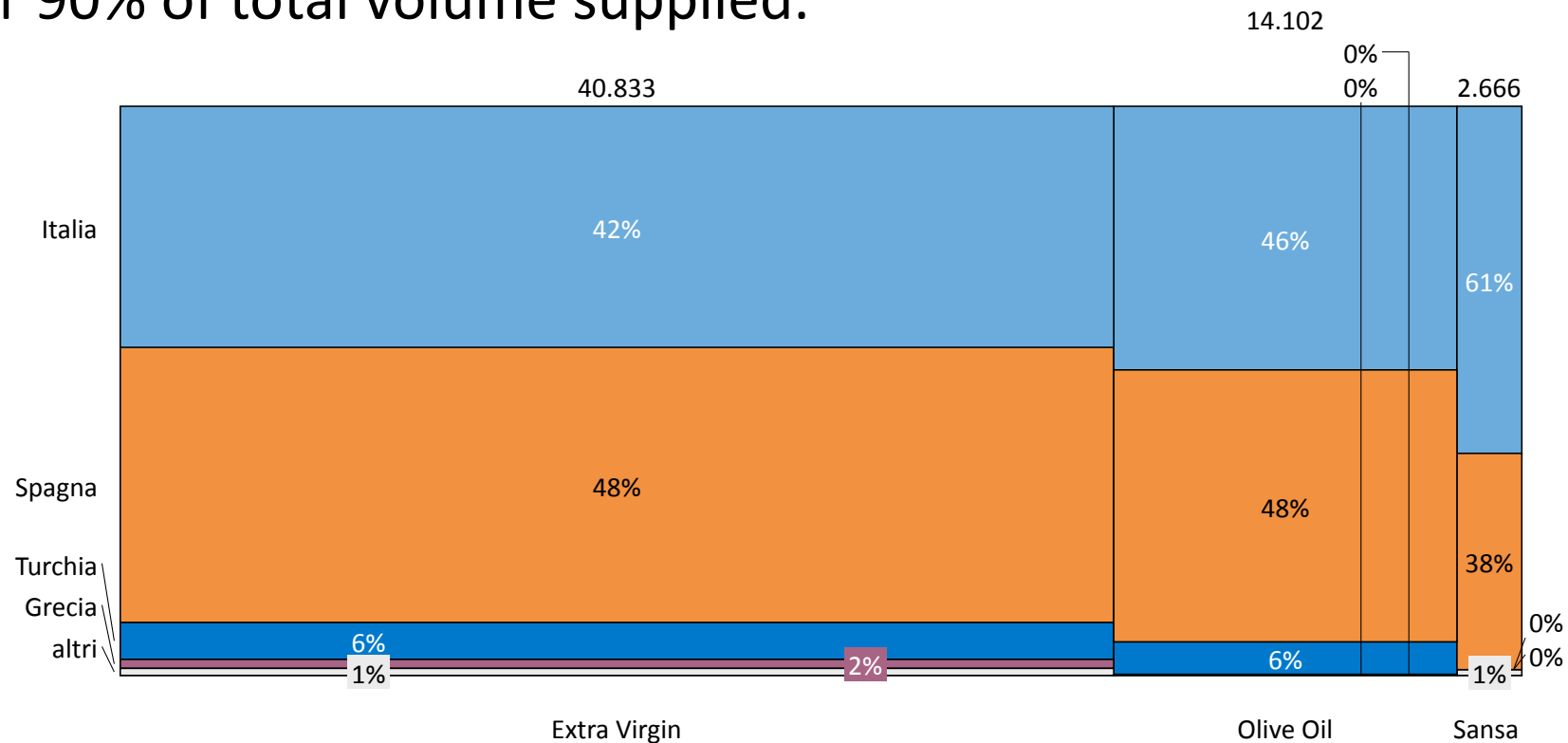
Official data Ministry of Finance Japan



The Japanese Olive Oil market – sources of product – 2014 data in % & tons



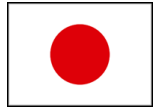
- Italy and Spain dominate the Olive Oil market in Japan as source, with over 90% of total volume supplied.



Yuko Edizioni – EXPO 2015, 16 Oct, 2015

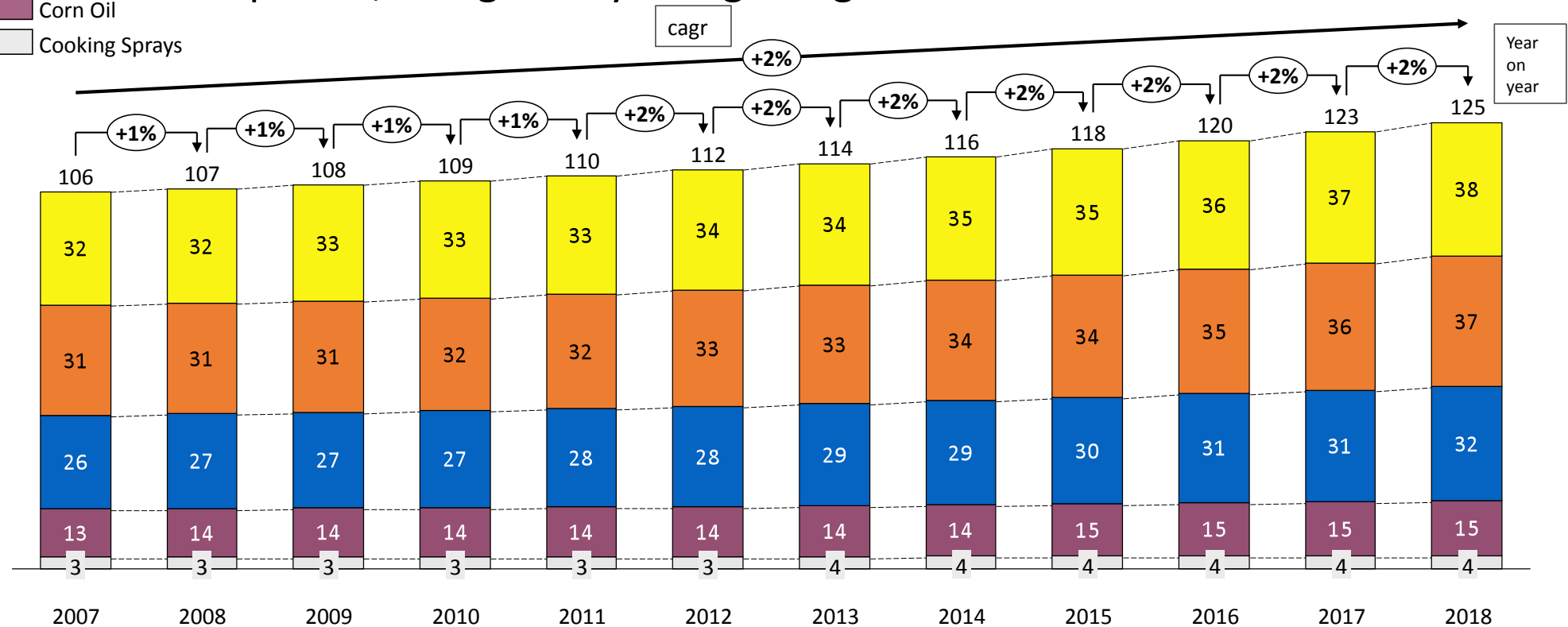
Actual official import data

Japan 2008 2018: volume trend for all Oils except standard vegetable oil. Retail Channels – source - Canadean, data n '000 tons



- Sunflower Oil
- Other Edible Oils
- Olive Oil
- Corn Oil
- Cooking Sprays

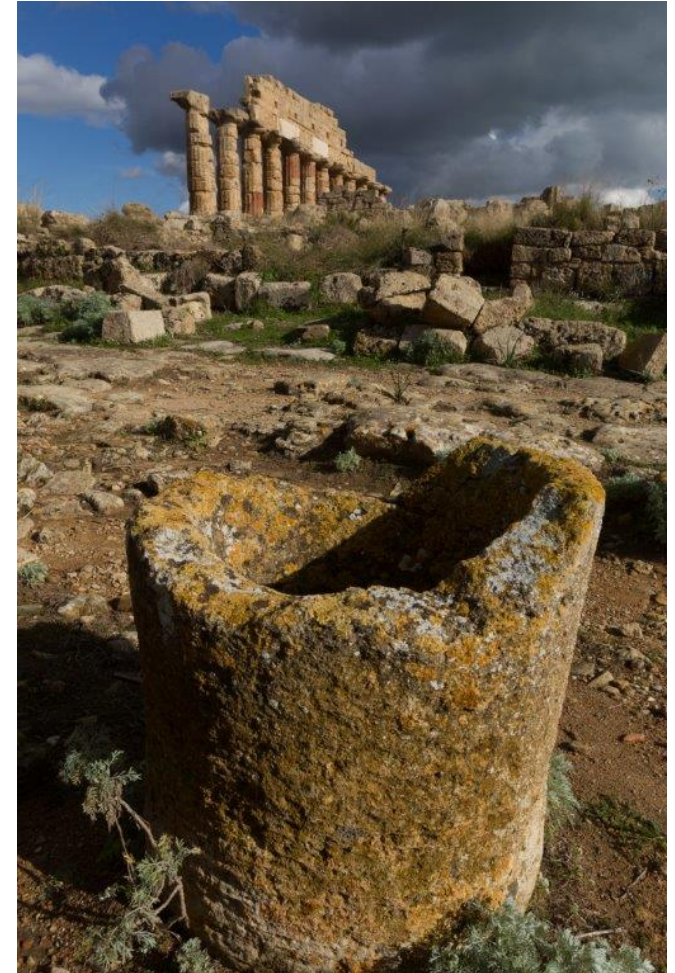
• Continuous growth for all categories, Olive Oil gains share in the period, rising slowly and getting 24% to 25% of total.



Yuko Edizioni – EXPO 2015, 16 Oct, 2015

Sicily and Olive Oil

- A histories of thousands of years



Yuko Edizioni – EXPO 2015, 16 Oct, 2015

Sicily and Olive Oil – D.O.P. s' in Sicily



- Monti Etna
- Monti Iblei
- Val di Mazara
- Valdemona
- Valle del Belice
- Valli Trapanesi

Sicily and Olive Oil

- Bio-diversity



Yuko Edizioni – EXPO 2015, 16 Oct, 2015