

An aerial night view of a city, likely Shanghai, with a dense grid of buildings and streets illuminated. Overlaid on the city are several glowing white arcs and dots, creating a network or globe-like structure. The sky is dark blue with some clouds and a few bright stars or lights.

Traditional Products – Innovation Landscape Olive Oil, Olives & Related Products

Methodology

ANALYSIS & PARAMETERS

- Analysis is performed based on new product launches tracked on the Innova Database.
- Geography: Europe.
- Time Frame: 2014 – 2018.
- Category: Sauces & Seasonings; Fruit & Vegetables.
 - Subcategories: Oils; Vegetables.
 - Specific Product Base search: black olives, green olives, halkidiki olives, kalamata olives, olive oil, olives.
 - Free text search for products with “Protected designation of origin”, “Protected geographical indication”, “Traditional specialties guaranteed”, “Product of Canary Islands”, “Mountain Product” and “Product of Island Farming”.

ABBREVIATIONS AND NOTES

- CAGR = Compound Annual Growth Rate
- F&B = Food & Beverage
- NPL = New Product Launches
- PDO = Protected designation of origin
- PGI = Protected geographical indication
- TSG = Traditional specialties guaranteed
- Number of respondents of Consumer Survey: **500 per analyzed country.**
- Traditional/origin seal = products with PGI, PDO, TSG, Mountain Product, Product of Canary Islands and Product of Island Farming seal.
- Traditional positioning = products with “traditional” positioning at Innova Database.
- Olive-based products = olive oil, olives & related products

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Overview of Trends in Olive-based Products - Europe



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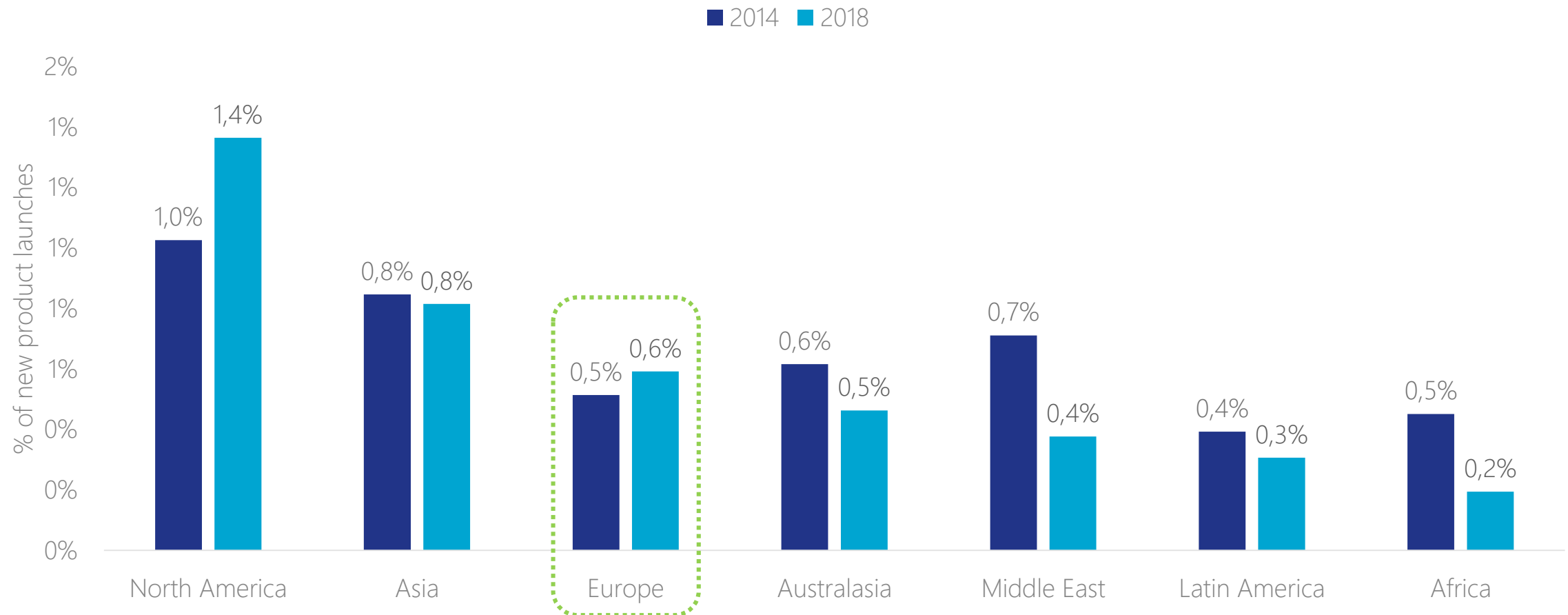


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Olive-based products presence has slightly increased in Europe

- Olive-based products presence has increased in Europe from 0.5% in 2014 to 0.6% of all F&B product launches tracked, however, North America has the strongest presence.

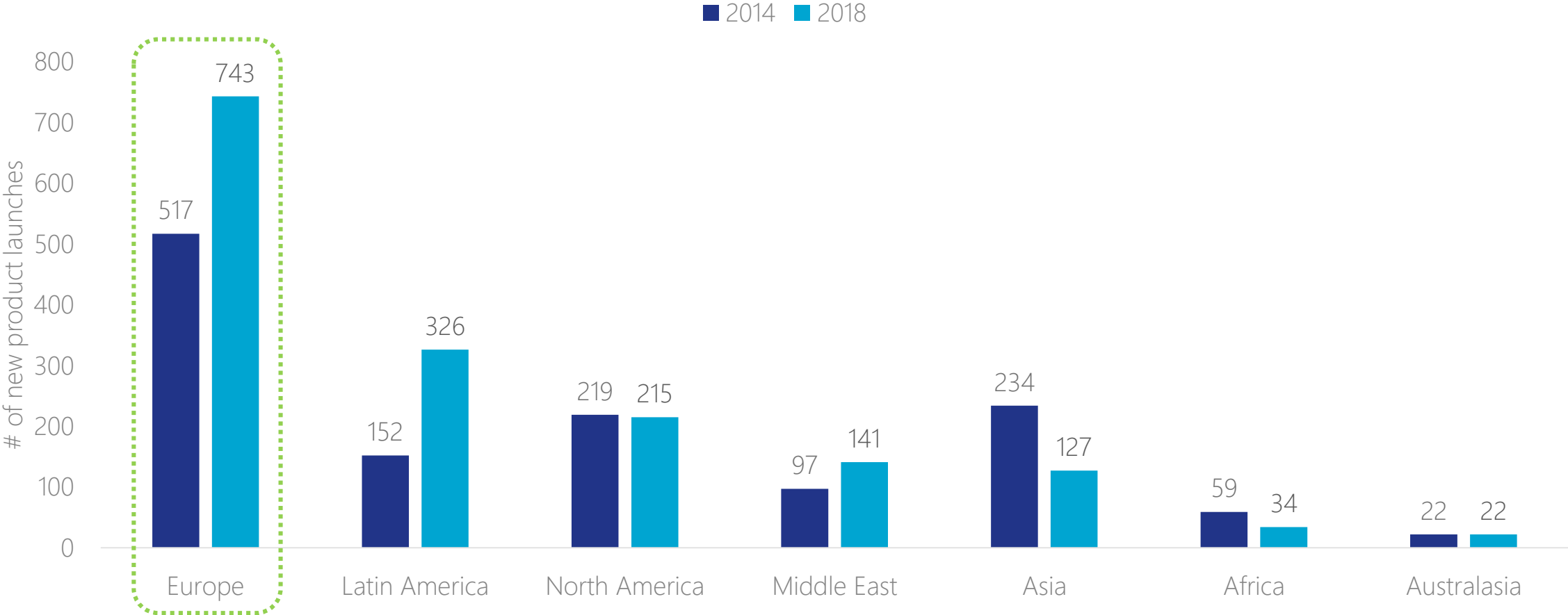
Olive-based products as percentage (%) of F&B new product launches tracked per region (2018 vs. 2014)



Europe leads olive-based new product launches

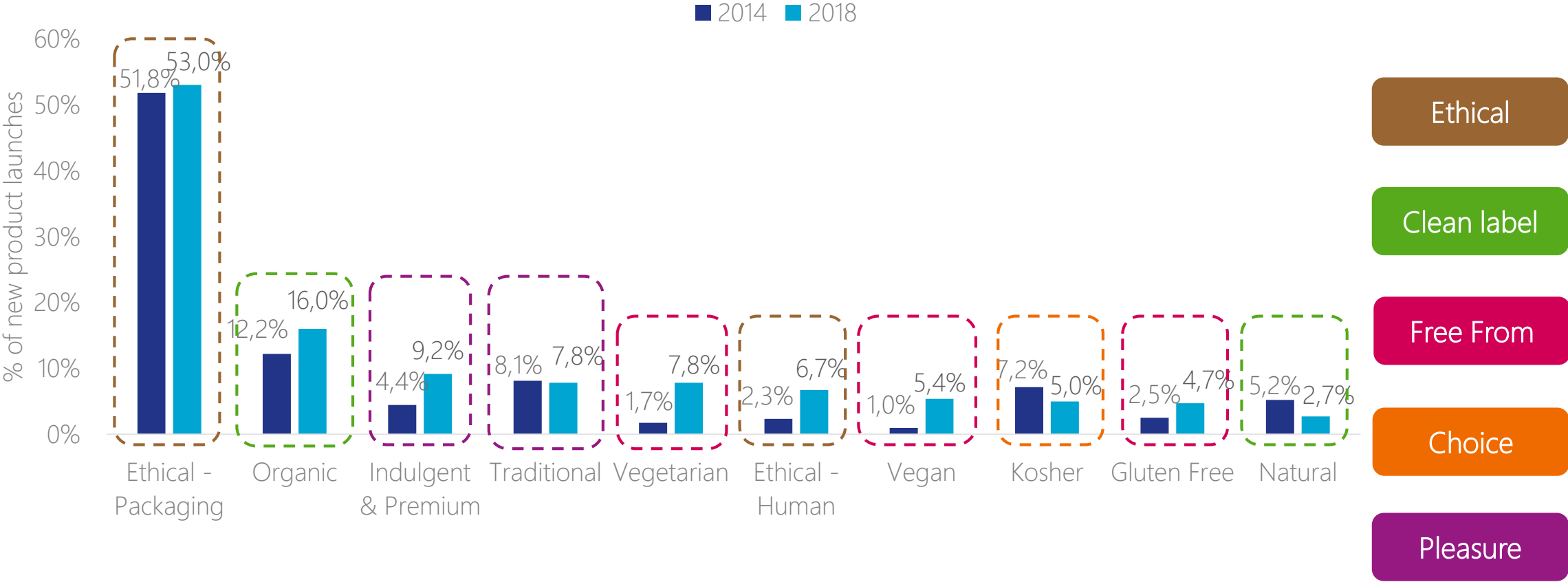
- Europe, Latin America and Middle East have increasing product launch activity in olive-based products while Asia shows major decrease.

Number of olive-based products new product launches tracked per region (2018 vs. 2014)



Ethics lead in olive-based positionings in Europe

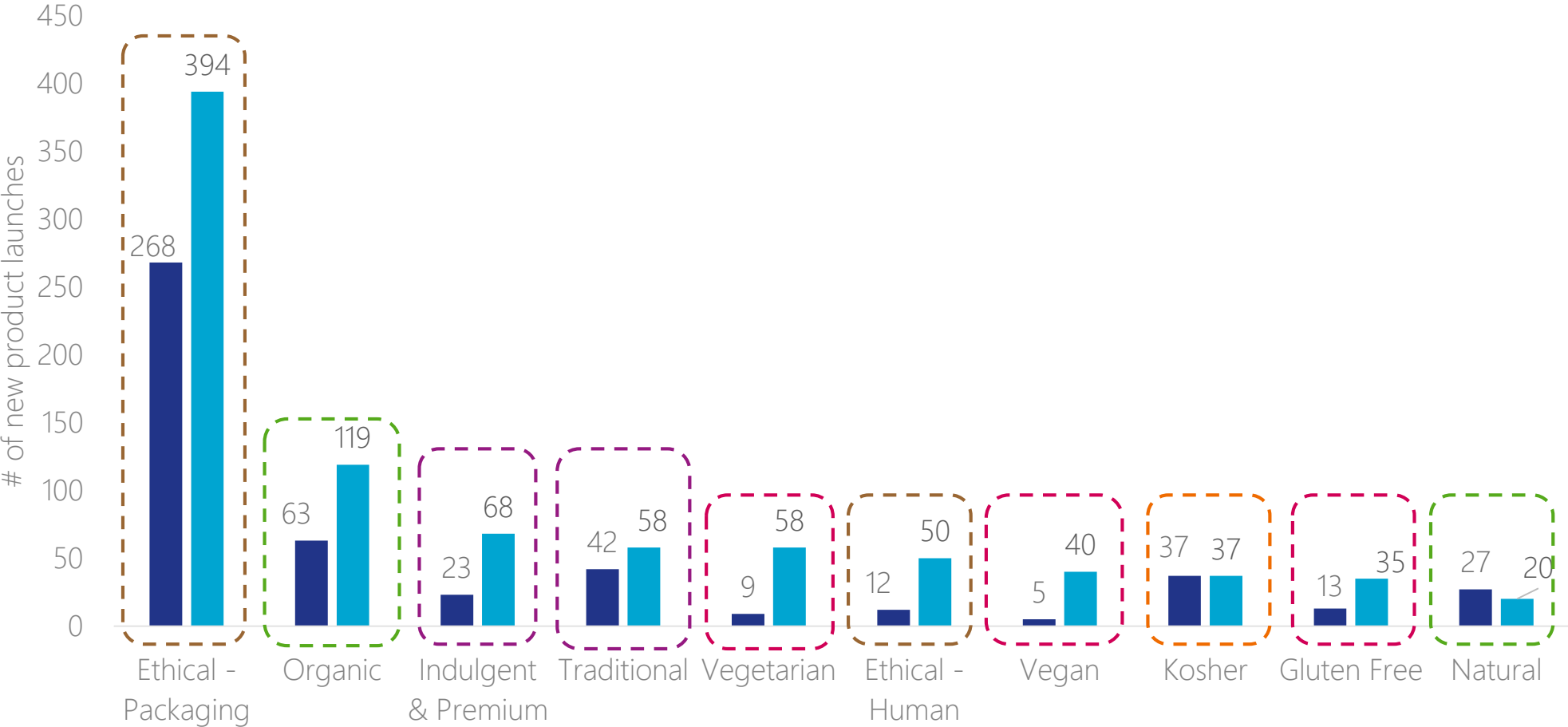
Top positionings as percentage (%) of olive-based new product launches tracked (Europe, 2018 vs. 2014)



Ethics lead in olive-based positionings in Europe

Number of olive-based new product launches tracked per positioning (Europe, 2018 vs. 2014)

■ 2014 ■ 2018



Ethical

Clean label

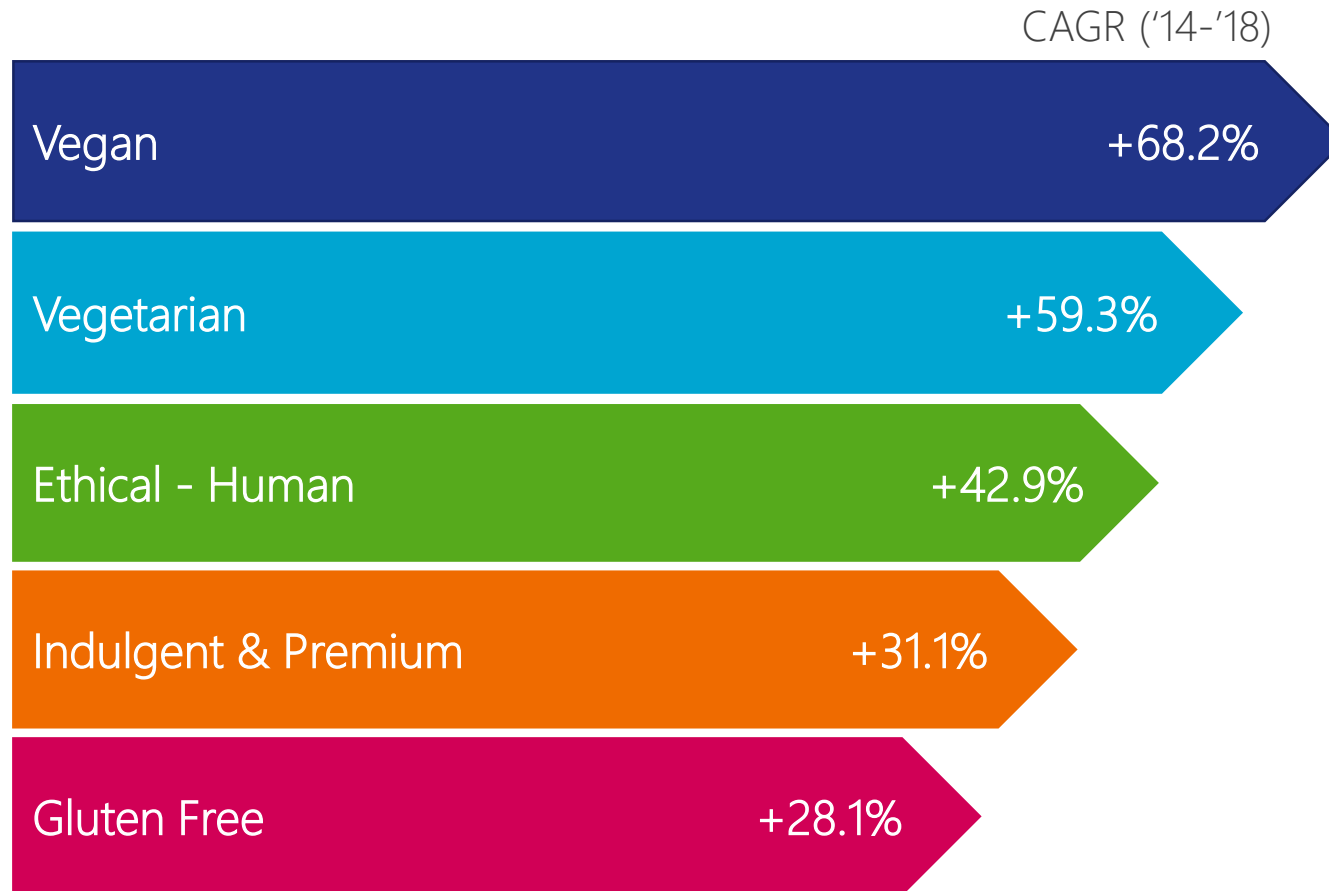
Free From

Choice

Pleasure

Free-from claims are fastest growing in European olive-based products

Fastest growing top positionings as an average annual growth rate (%) in new olive-based product launches tracked (Europe, CAGR 2014-2018)

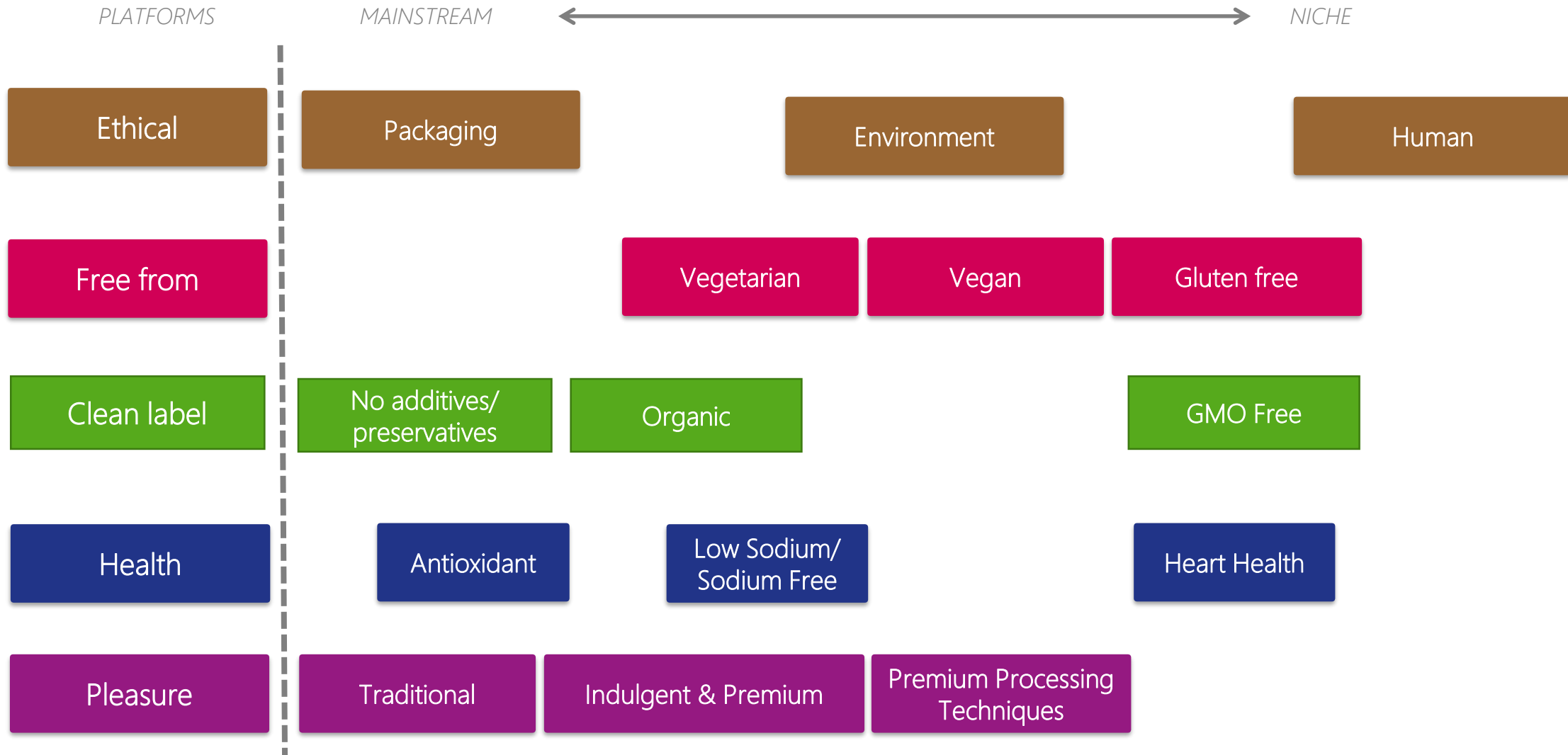


Deluxe Spanish Manzanilla Extra Virgin Olive Oil

Spain, Apr 2019

CLAIMS Exclusively made from Spanish manzanilla olives. Superior category olive oil obtained directly from olives and solely by mechanical means. **Suitable for vegetarians. Suitable for vegans.** Recyclable packaging.

Key innovation platforms in olive-based products



Overview of Trends in Traditional Olive-based Products - Europe



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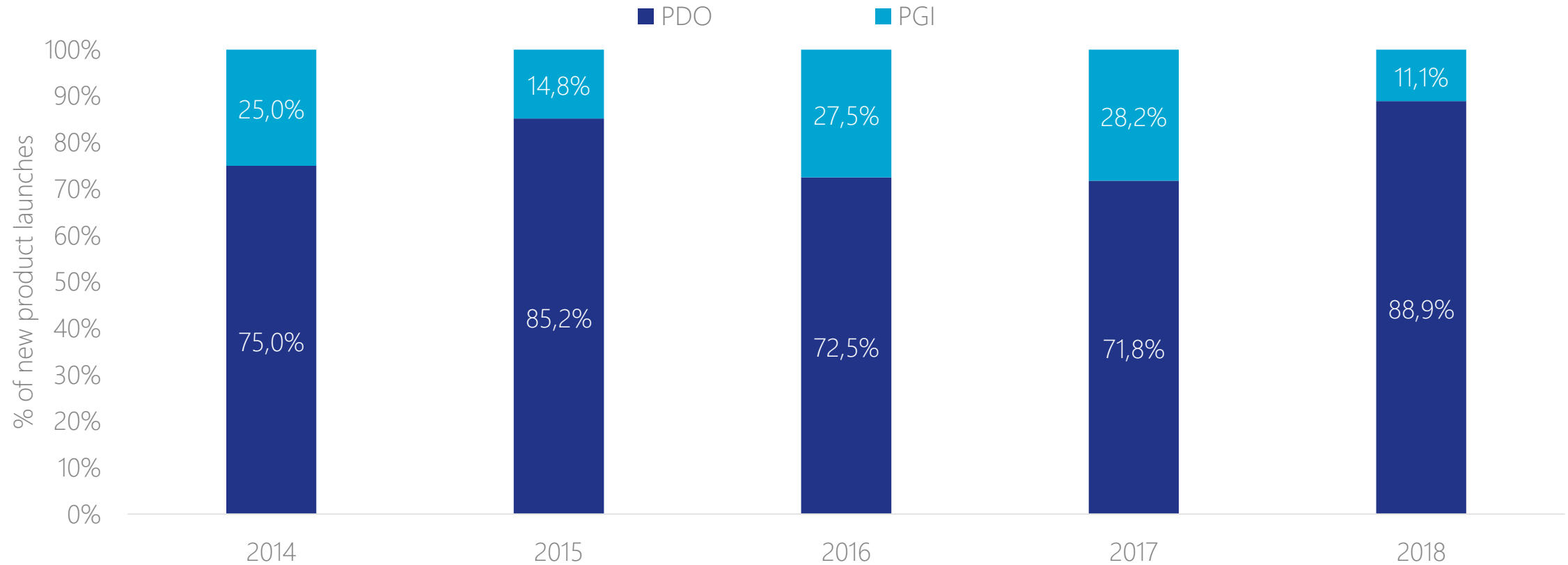


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9 out of 10 olive-based products with traditional seal in Europe has a PDO seal

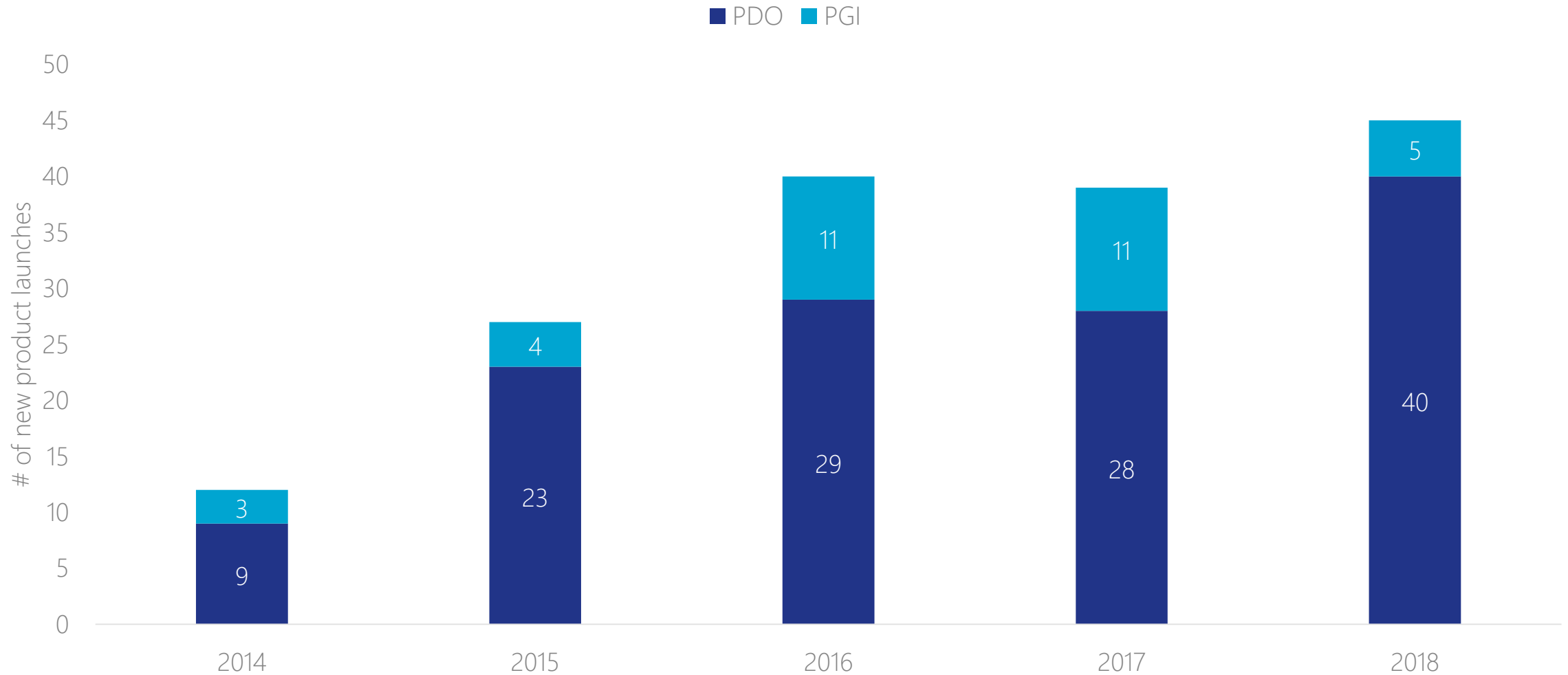
- Share of PDO and PGI seal in olive-based products fluctuates in Europe with PDO seal accounting for nearly 90% of NPD with origin seal in 2018.

Share of traditional/origin seal claims as percentage (%) of new olive-based product launches tracked with traditional/origin seal (Europe, 2014-2018)



2018 is the year with highest NPD with PDO and PGI seals

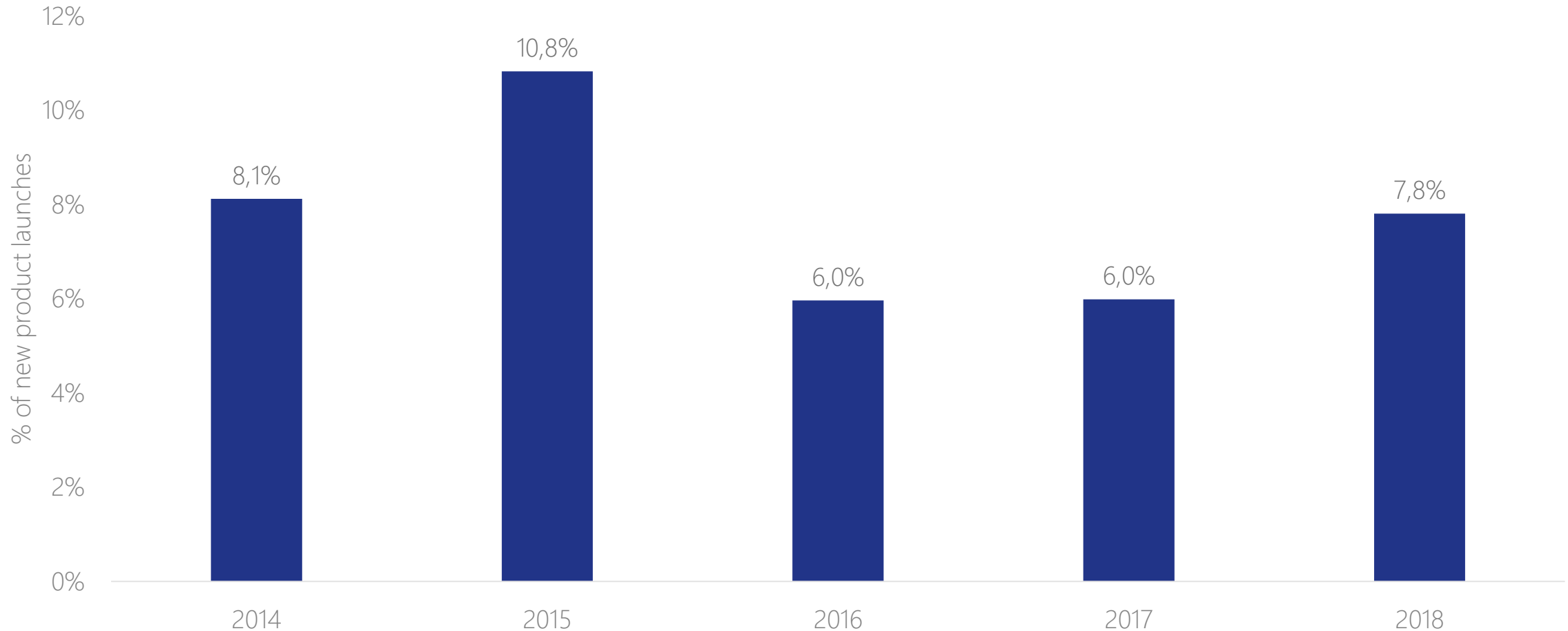
Number of new olive-based products launches tracked with traditional/origin seal (Europe, 2014-2018)



Traditional positioning fluctuates in European olive-based products

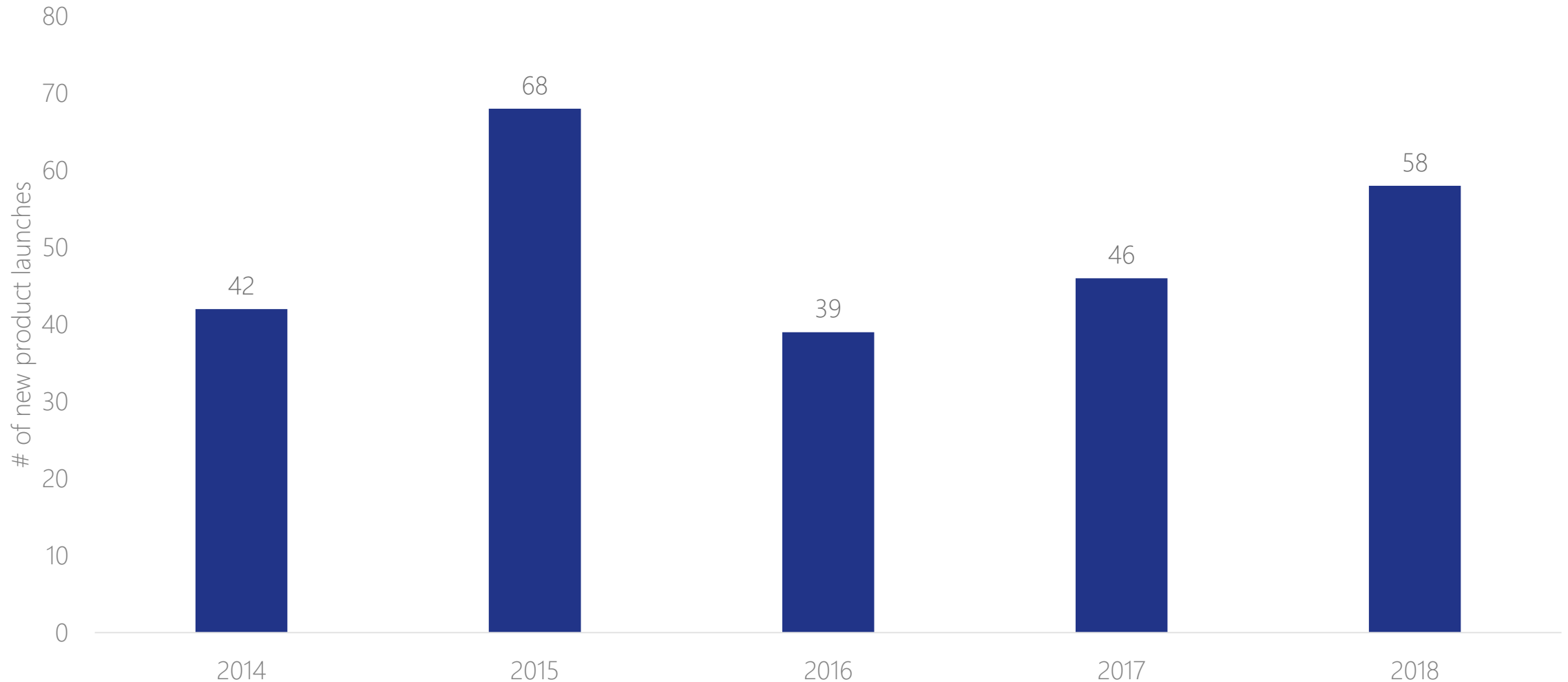
- With share varying from 6.0% to 10.8%, traditional positioning is not stable in European olive-based products.

Share of traditional positioning as percentage (%) of new olive-based product launches tracked (Europe, 2014-2018)



Traditional positioning fluctuates in European olive-based products

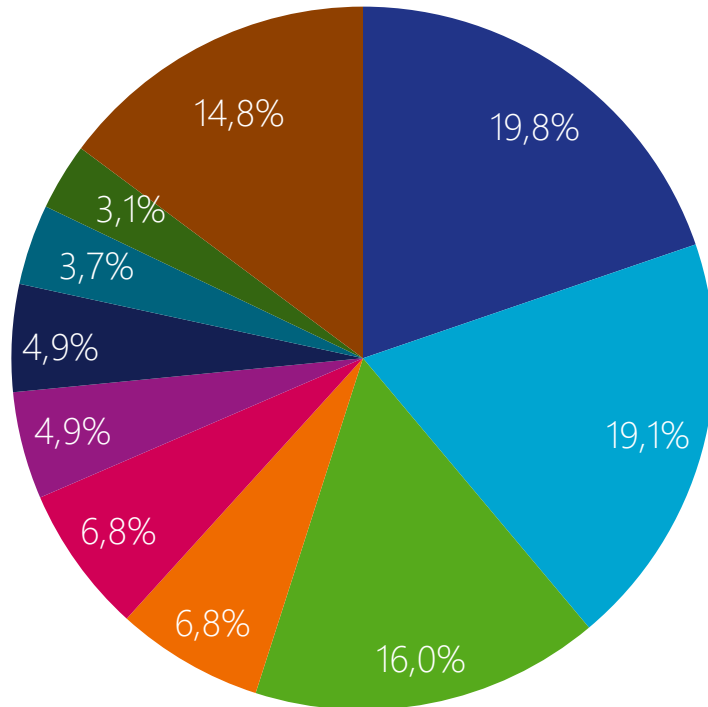
Number of new olive-based products with traditional positioning launches tracked (Europe, 2014-2018)



1 in 5 NPL with origin seal in European olive-based products is German

Top countries as percentage (%) of new olive-based product launches tracked with traditional/origin seal (Europe, 2014-2018)

- Germany
- France
- Sweden
- Rest of Europe
- Spain
- Italy
- Norway
- United Kingdom
- Poland
- Slovenia



Ionis Lesvos Natives Olivenol Extra: Extra Virgin Olive Oil

Germany, Feb 2019

CLAIMS **Protected Geographical Indication logo**. Agrocert certified. Recyclable packaging.



Oleoestepa Aceite De Oliva Virgen Extra: Extra Virgin Olive Oil

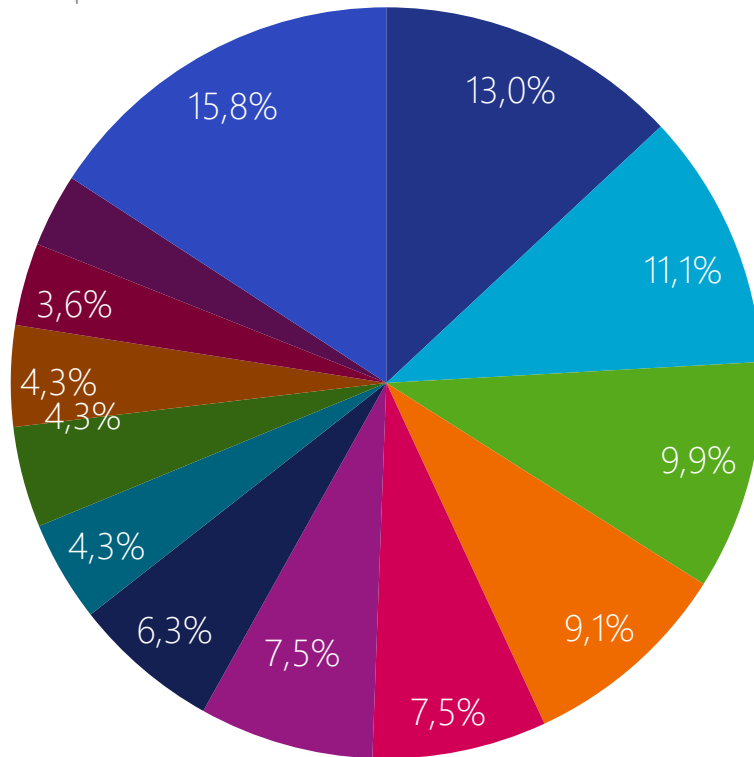
Spain, Dec 2018

CLAIMS Selection. Integrated production. **Protected Designation of Origin logo** (Estepa). High vitamin E content. Cold pressed...

Russia leads launches with traditional positioning in olive-based products

Top countries as percentage (%) of new olive-based product launches tracked with traditional positioning (Europe, 2014-2018)

- Russia
- Germany
- Netherlands
- Portugal
- Rest of Europe
- Spain
- France
- Belgium
- Switzerland
- Italy
- United Kingdom
- Greece
- Macedonia



Borges Original Extra Virgin Olive Oil

Russia, Jan 2019

CLAIMS Cold extraction. Certified kosher. Green Dot Certified. Recyclable packaging.



Sama Olive Verdi Denocciolate In Salamoia: Pitted Green Olives In Brine

Italy, Jan 2019

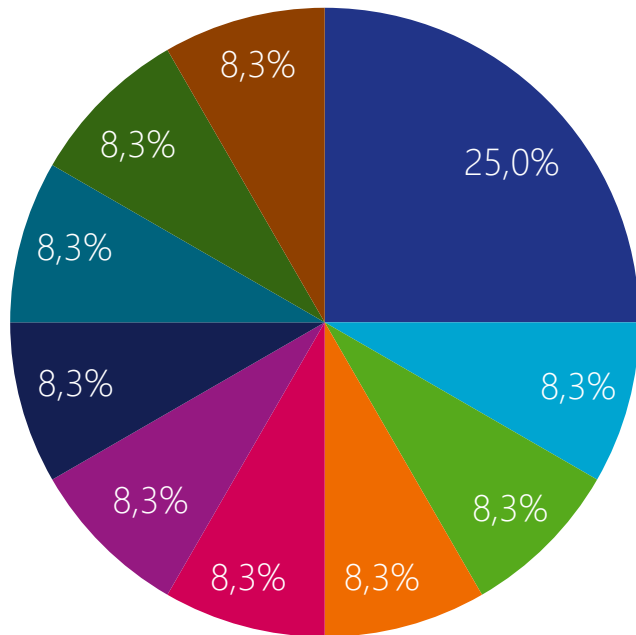
DESCRIPTION Pitted green olives in brine Comes in a 700g resealable plastic packet.

Lidl is the top company in product launches with traditional/origin seal

- Europe market for traditional products received new players, going from 10 companies tracked in 2014 to 129 companies in 2019.

Top companies as percentage (%) of new olive-based product launches tracked with traditional/origin seal (Europe, 2014)

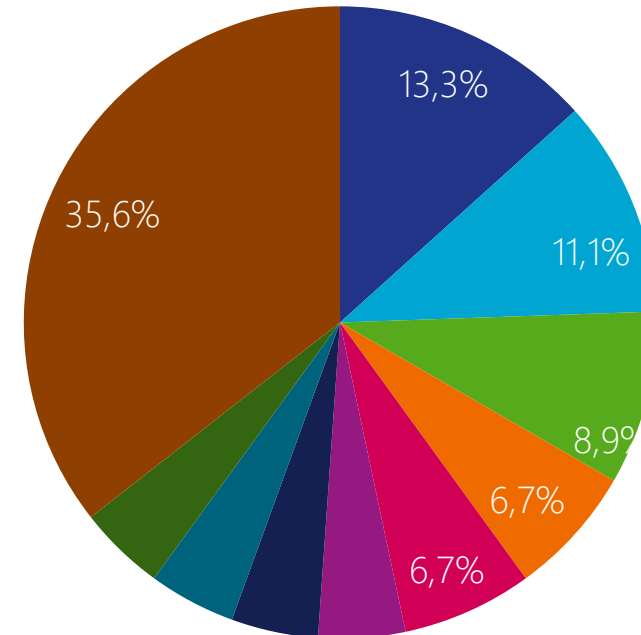
- | | | |
|--------------------|--------------------|------------------|
| ■ Salov | ■ Anoskeli | ■ Argo |
| ■ A. A. Buonamici* | ■ Jordan Olivenoel | ■ Messinia Union |
| ■ Montalbano | ■ Redoro | ■ Waitrose |
| ■ Monini | | |



*Azienda Agricola

Top companies as percentage (%) of new olive-based products launches tracked with traditional/origin seal (Europe, 2018)

- | | | |
|---------------------|-------------------|--------------|
| ■ Lidl | ■ El Corte Ingles | ■ Carrefour |
| ■ Gaea Products | ■ Trenon | ■ Aldi |
| ■ Eroski | ■ Monini | ■ Oleoestepa |
| ■ Other companies** | | |

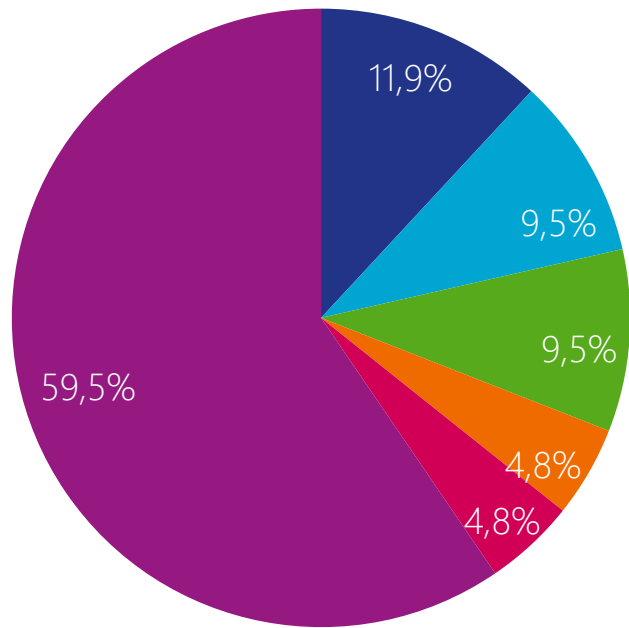


** Other companies = 16 companies

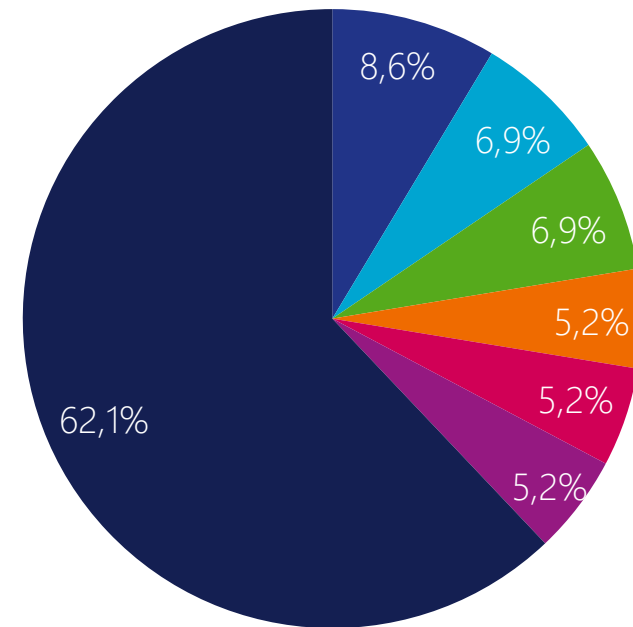
Dumet leads olive-based product launches with traditional positioning

- Olive-based products market for traditional positioning is more fragmented than the segment of traditional/origin seal.

Top companies as percentage (%) of new olive-based product launches tracked with traditional positioning (Europe, 2014)



Top companies as percentage (%) of new olive-based product launches tracked with traditional positioning (Europe, 2018)

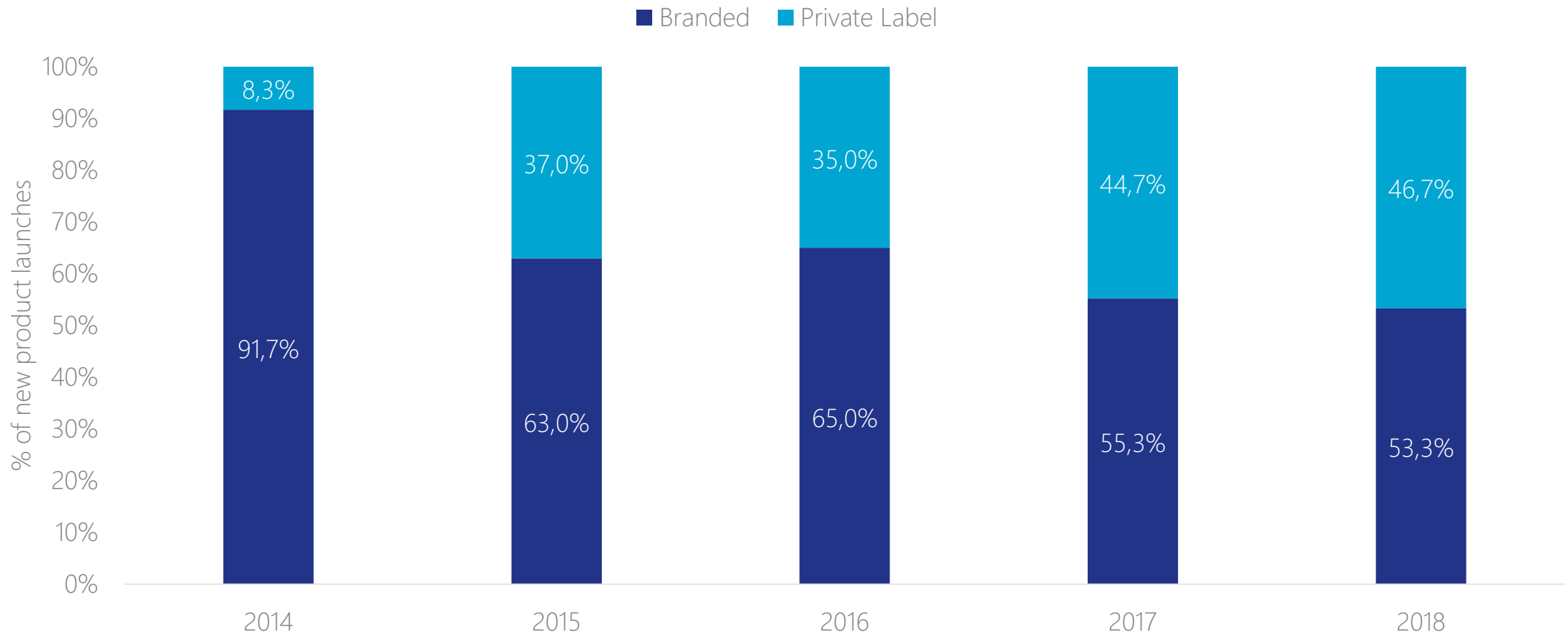


* Other companies = 25 companies

** Other companies = 31 companies

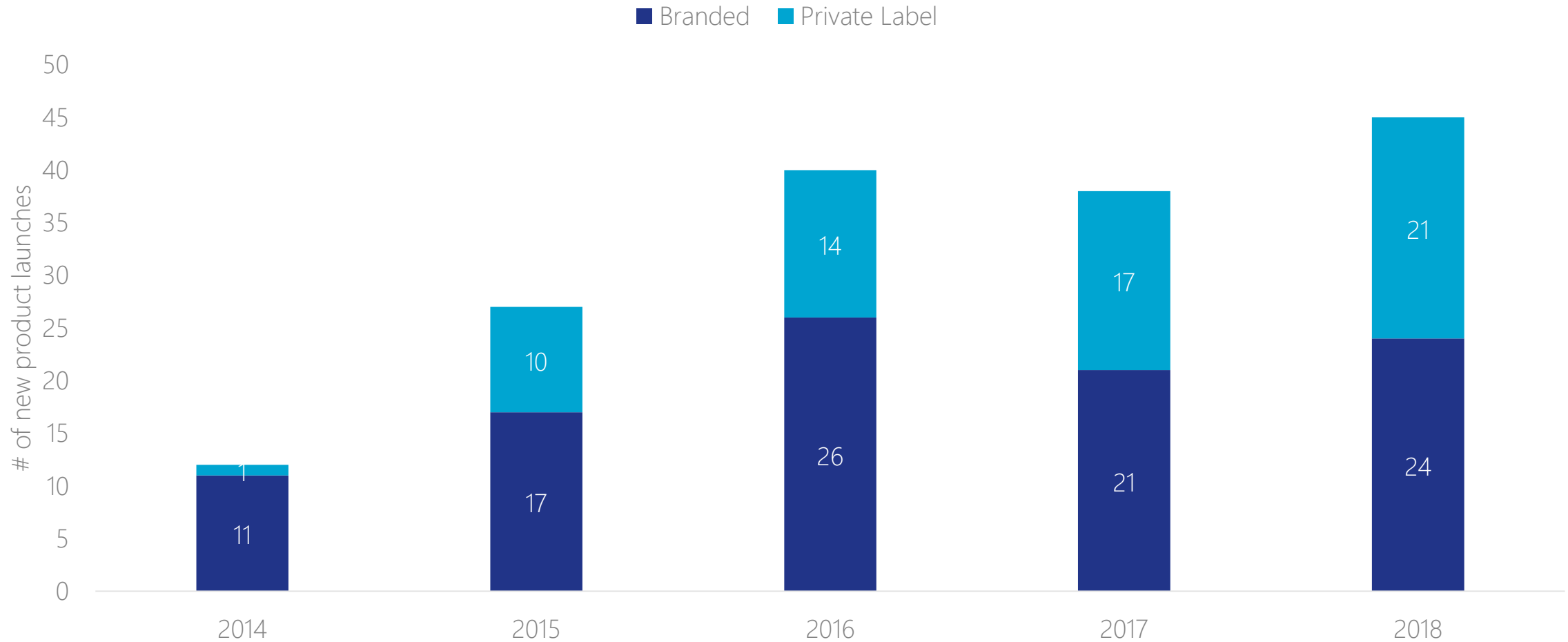
More private label olive-based products launches with traditional seal

Share of branded and private label as percentage (%) of new olive-based product launches tracked with traditional/origin seal (Europe, 2014-2018)



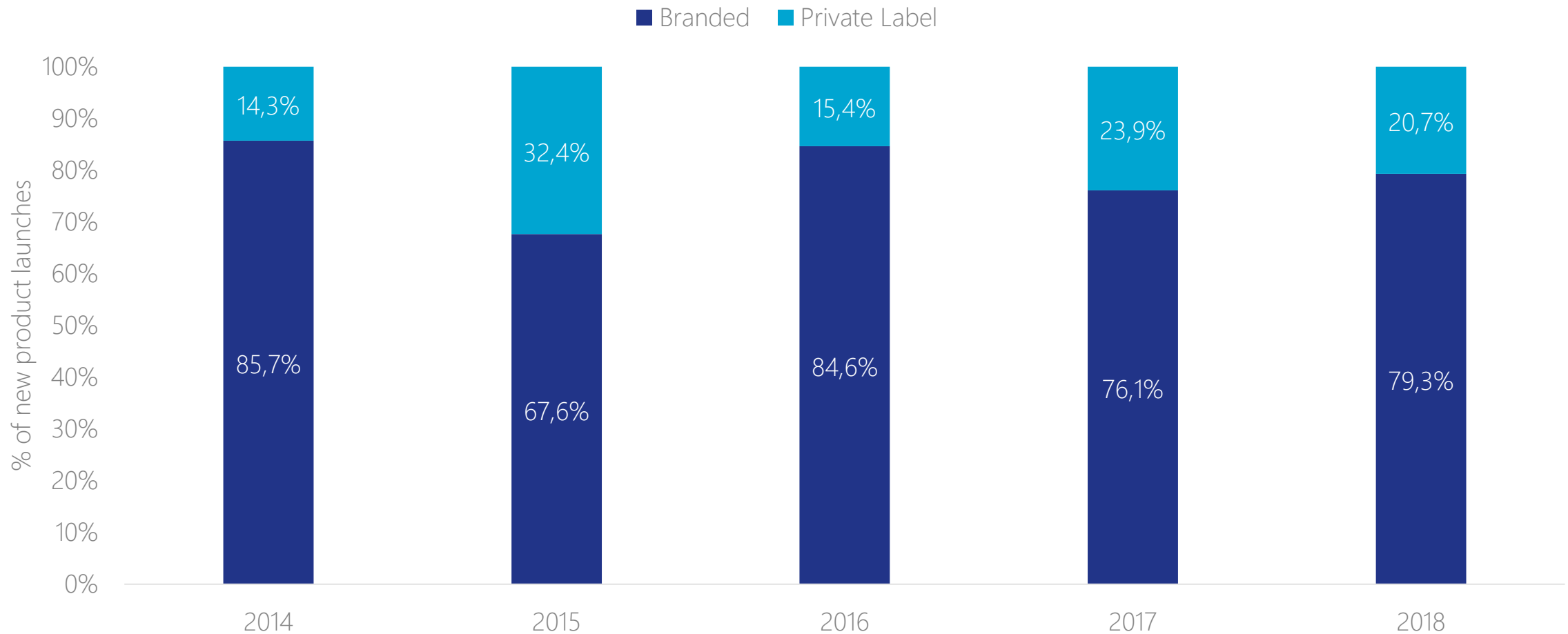
Presence of private label increased in products with traditional/origin seal

Number of new olive-based products with traditional/origin seal* branded and private label (Europe, 2014-2018)



More branded products with traditional positioning and absence of seal

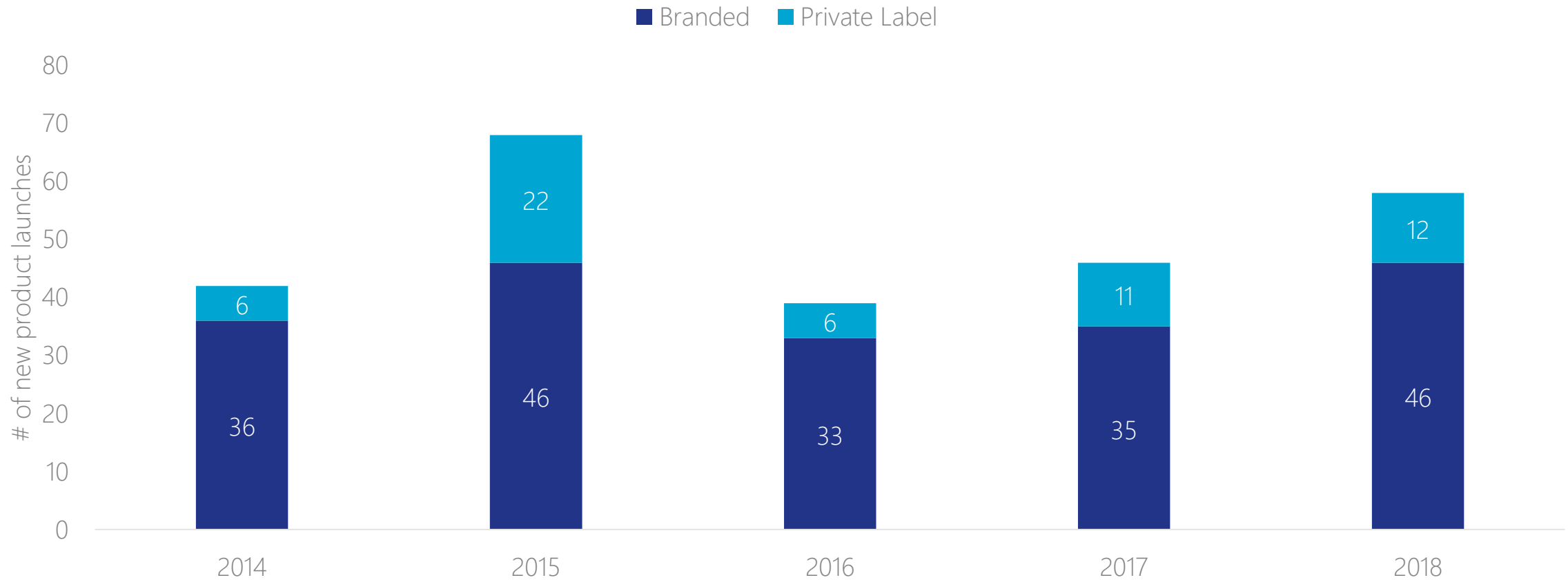
Share of branded and private label as percentage (%) of new olive-based product launches tracked with traditional positioning (Europe, 2014-2018)



More branded products with traditional positioning and absence of seal

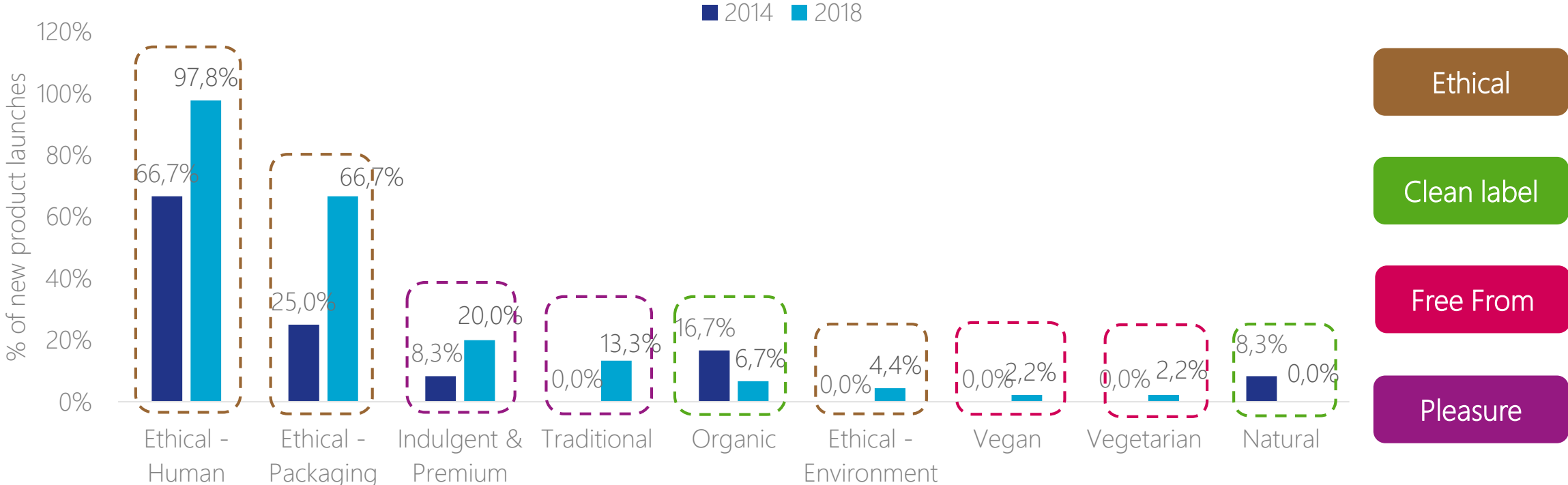
- While products with traditional/origin seal have higher private label presence, in products with traditional positioning and not necessarily having an origin seal, there is higher presence of branded product launches.

Number of new olive-based products with traditional positioning branded and private label (Europe, 2014-2018)



Ethical claims and pleasure on top of products with traditional/origin seal

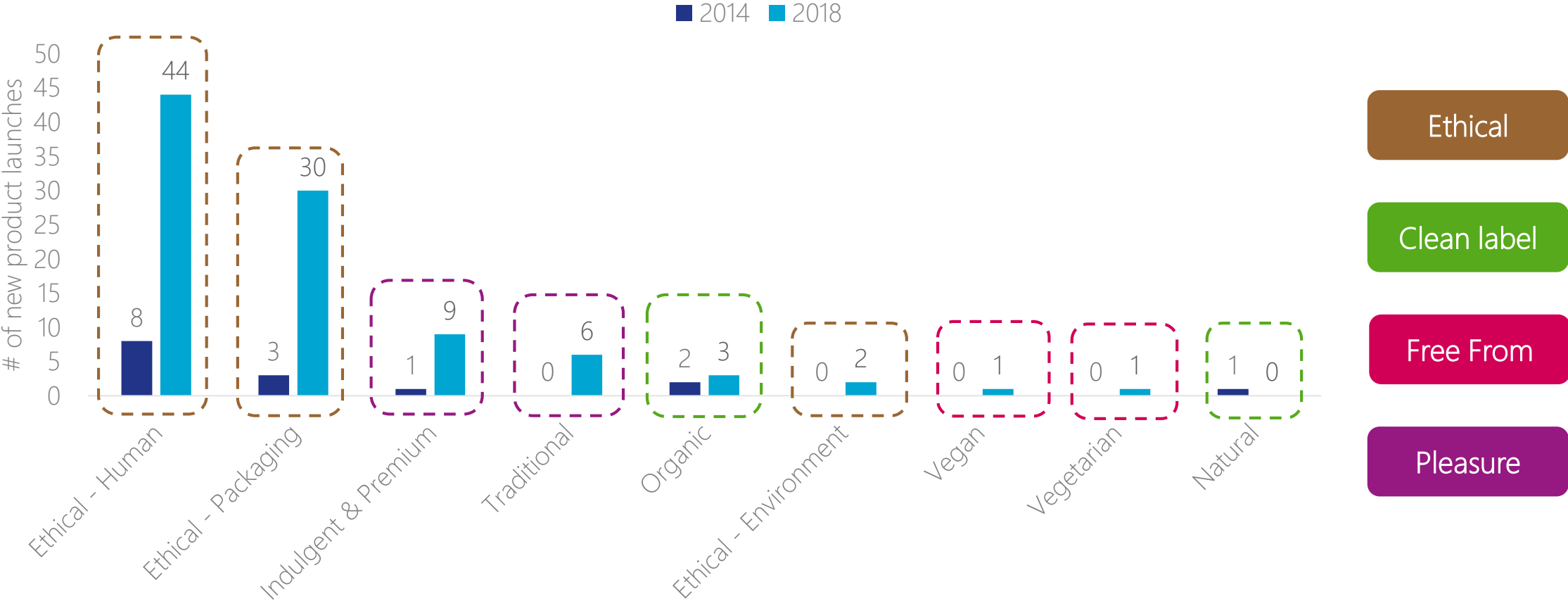
Top positionings as percentage (%) of olive-based new product launches tracked with traditional/origin seal (Europe, 2018 vs. 2014)



*Traditional/origin seal = products with PGI or PDO seal.

Ethical claims and pleasure on top of products with traditional/origin seal

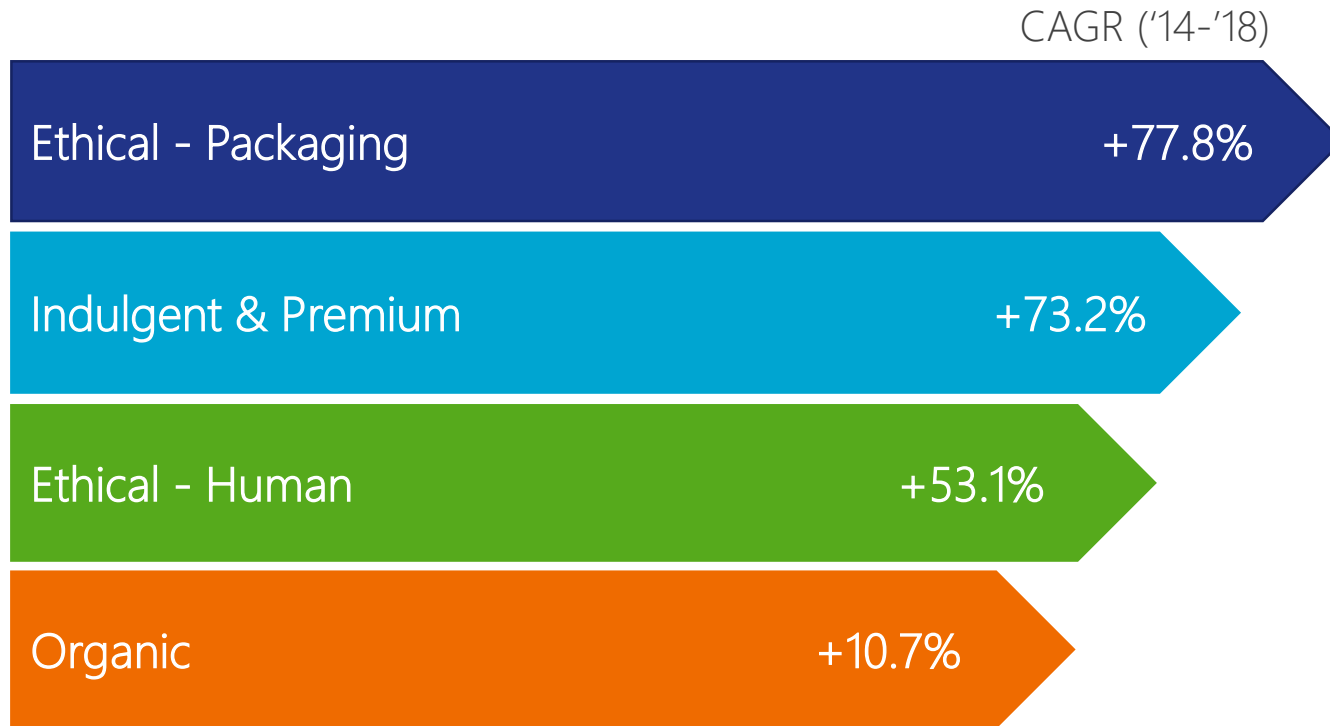
Number of new olive-based products with traditional/origin seal launches tracked per positioning (Europe 2014 vs. 2018)



*Traditional/origin seal = products with PGI or PDO seal.

Ethical claims are fastest growing in European olive-based products

Fastest growing top positionings as an average annual growth rate (%) in new olive-based product launches tracked (Europe, CAGR 2014-2018)



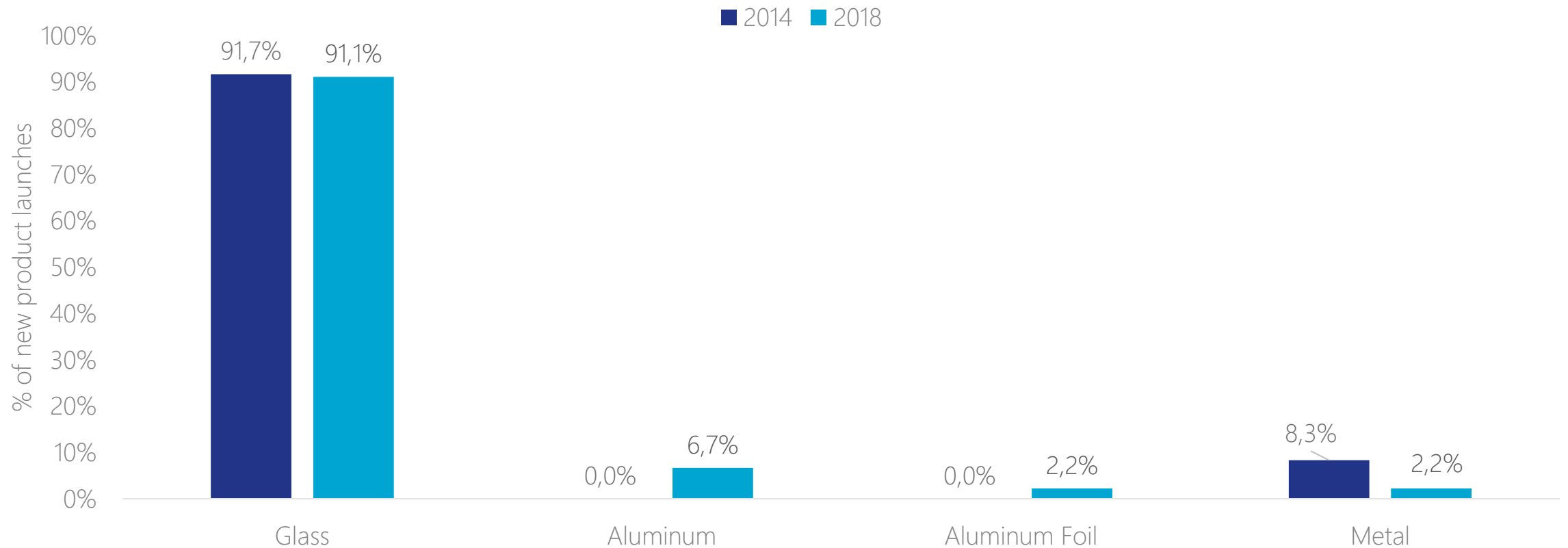
Eridanous Greek Extra Virgin Olive Oil

Netherlands, Apr 2019

CLAIMS Superior category olive oil obtained directly from olives and solely by mechanical means. **Recyclable packaging.**

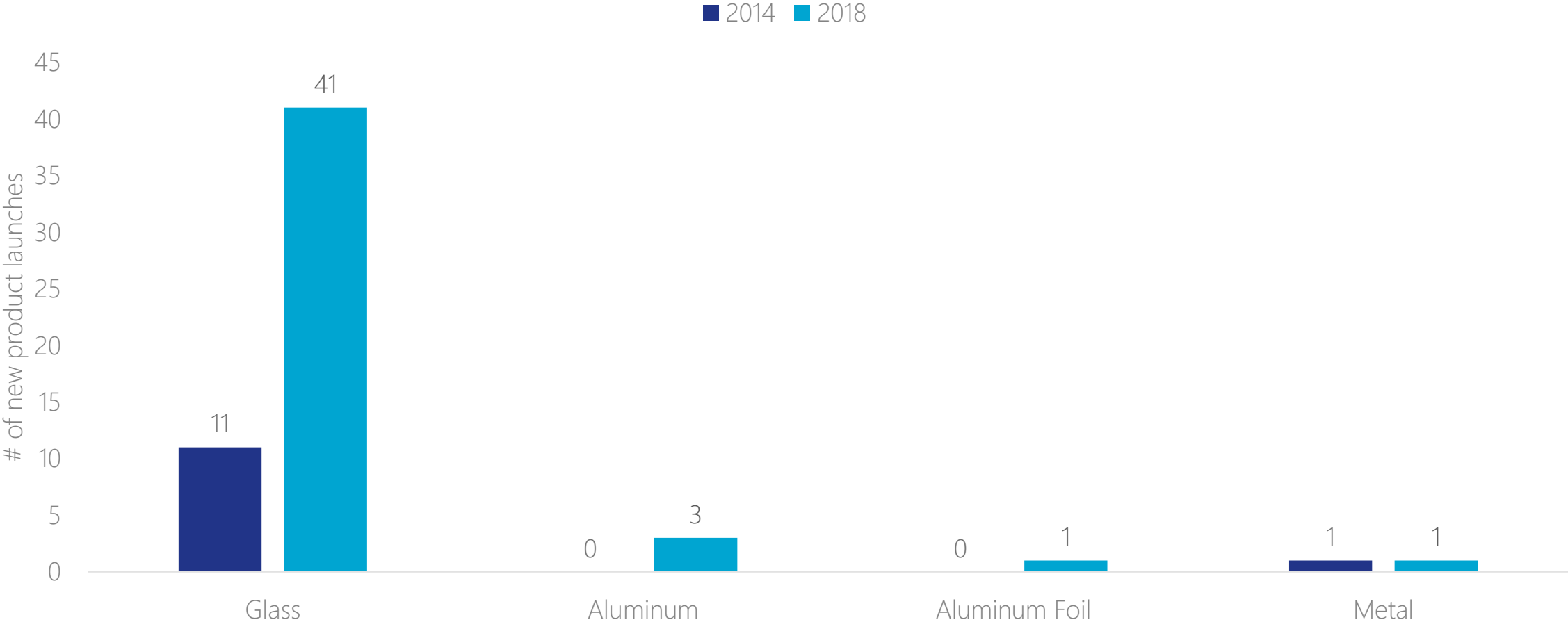
9 out of 10 olive-based products with seal have a glass packaging

Packaging material as percentage (%) of olive-based new product launches tracked with traditional/origin seal (Europe, 2014 vs. 2018)



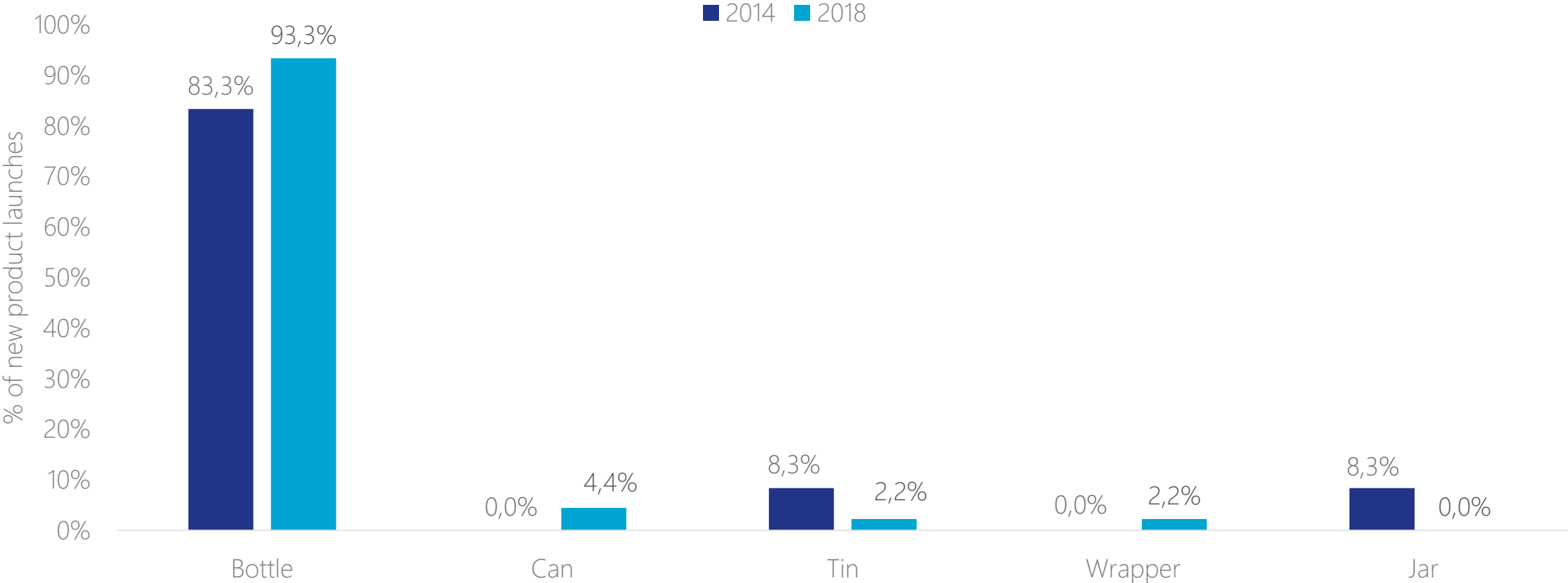
Glass remains the main packaging material in olive-based products with seal

Number of new olive-based products with traditional/origin seal launches tracked per packaging material (Europe, 2014 vs. 2018)



Bottle leads olive-based packaging while tin decreases

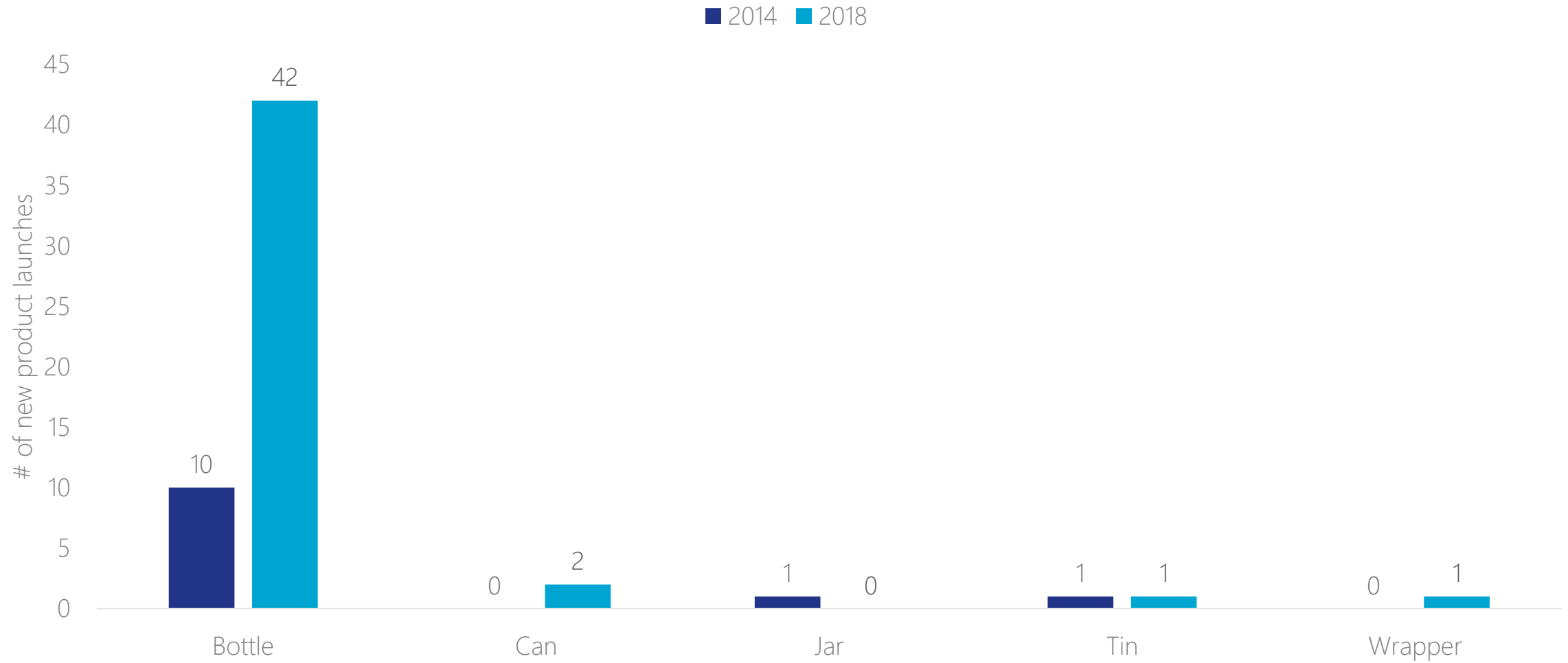
Packaging type as percentage (%) of olive-based new product launches tracked with traditional/origin seal* (Europe, 2014 vs. 2018)



*Traditional/origin seal = products with PGI or PDO seal.

Bottle leads olive-based products packaging

Number of new olive-based products with traditional/origin seal launches tracked per packaging type (Europe, 2014 vs. 2018)



Innovation Opportunities in Olive-based Products with Traditional/Origin Seal - Europe



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Spotlight on ethical claims: animal, human and packaging

ENVIRONMENT



Casino Bio Huile D'olive Vierge Extra: Organic Extra Virgin Olive Oil

France, Feb 2019

CLAIMS Cold extracted. Certified AB organic. Green Dot Certified. Recyclable packaging.
Respects the nature.

ENVIRONMENT - ENERGY



O Med The Tomato Stall Aceite De Oliva Virgen Extra: Extra Virgin Olive Oil

United Kingdom, Jul 2018

CLAIMS ...Sustainability is paramount for this company and we love the fact **olive pits are used as energy to power the whole mill**. Both oils we have selected to be part of our range are very unique...

HUMAN



Raineri Olio Extra Vergine Di Oliva: Extra Virgin Olive Oil

Italy, Apr 2019

CLAIMS 100% Italian. Superior category olive oil obtained directly from olives and solely by mechanical means. **We give to research (an initiative, in support of Gold for Kids Foundation Umberto Veronesi for pediatric oncology)**



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Traditional positioning is also used in products without the seal



Pons Oliwa Z Oliwek Extra Virgin Tradycyjna: Traditional Extra Virgin Olive Oil

Poland, Apr 2019

DESCRIPTION **Traditional** extra virgin olive oil in a 500ml glass bottle. Perfect for salads and cooking.



Yannakopoulos Olive Grove Kalamata Olives Throumpa: Savory Kalamata Olives

Greece, Dec 2018

CLAIMS 100% natural product. Certified organic. **Traditional.**

Distinctive process makes for premium olive oil products



El Corte Ingles Enclaves D Oro Aceite De Oliva Virgen Extra: Picual Extra Virgin Olive Oil

Spain, Jul 2018

CLAIMS Protected Designation Of Origin certified (Sierra Magina). Superior category olive oil obtained directly from olives and solely by mechanical means. **Its organoleptic uniqueness lies in the selection of the Picual variety of olives at early maturity, which once milled at a temperature below 20 Celsius degrees, provide a balanced profile and strong and complex flavors** that make it unique...



Paolos Olio Extra Vergine Di Oliva Dop Umbria: Extra Virgin Olive Oil From Dop Umbria

Sweden, Jan 2019

CLAIMS ...This olive oil is a dop-labeled (Protected Designation of Origin) oil which testifies to the highest quality... **The olives are traditionally picked by hand and the production takes place with an impressive precision.** Terra Umbria has an optimal acid composition, with a concentration of oleic acid above 75% and a high content of polyphenols. **The oil is cold extracted under constant temperature monitoring to ensure that the temperature never exceeds 27 degrees, all in order to maintain maximum flavor, nutrients and a high poly-phenol content...**

Premium products made of early harvested olives



Waitrose Early Harvest Domat Olives

United Kingdom, Jan 2019

DESCRIPTION Waitrose **early harvest pitted domat olives** in sunflower oil, in a 190g PET tray.



Bio Planete Nouvelle Récolte Nieuwe Oogst 2018 Huile D' Olive Oljfolie Vierge Extra: Extra Virgin Olive Oil

Germany, Dec 2018

CLAIMS Bio Planete olive oil "Nouvelle Récolte" extra virgin 2018 **is the first olive oil from this year's harvest**– unfiltered and single varietal. Experts love this seasonal oil, especially for its crisp note of freshly cut grass. Gourmet. Certified AB organic. Suitable for vegetarians, vegans and a raw food diet.



Sabor Granada Amarga Y Pica Aceite De Oliva Virgen Extra: Bitter And Itchy Extra Virgin Olive Oil

Spain, Feb 2019

CLAIMS Special edition. **Early harvest (prepared the first days of November)**. Protected Designation of Origin logo. Quality certified. Olive oil of superior category obtained directly from olives and only by mechanical procedures. Green Dot Certified.

Unfiltered claim is on the rise in Europe

21%

Average annual growth of olive-based product launches tracked with an 'unfiltered' claim.

(Europe, CAGR 2014-2018)



Piesse Olio Extra Vergine Di Oliva Non Filtrato: Unfiltered Extra Virgin Olive Oil

Italy, Dec 2018



O Mana Gea Unfiltered Organic Virgin Olive Oil

Poland, Apr 2019



Coosur Origen Aceite De Oliva Virgen Extra Sin Filtrar: Unfiltered Extra Virgin Olive Oil

Spain, Mar 2019

Exploring formats and materials that stand out of the shelves



Feliz Naturel Sizma Zeytinyagi: Extra Virgin Olive Oil

Turkey, Jan 2019



Centonze Case Di Latomie Olio Extra Vergine Di Oliva Biologico: Organic Extra Virgin Olive Oil

Italy, Mar 2019



Zeet Limited Edition Extra Virgin Olive Oil

United Kingdom, Sep 2018

Aluminum bottle is an emerging new packaging for olive oil



Franprix Huile D Olive Vierge Extra Fruité Mur: Ripe Fruit Extra Virgin Olive Oil

France, Mar 2019



Pons Extra Virgin Olive Oil

Netherlands, Nov 2018



Chateau De Panisse Fruite Vert Huile D Olive Oil Vierge Extra Virgin: Fruity Green Extra Virgin Olive Oil

France, Apr 2019

Citrus fruit flavors provide a fresh touch to olive-based products

ORANGE



Nicolas Alziari Huile D Olive Vierge Extra Orange: Orange Flavored Extra Virgin Olive Oil

France, Mar 2019

LEMON



Selection Gout Nocellara Au Citron: Green Olives With Lemon

France, Dec 2018

Herbal flavors promote flavor twist to olive-based products

BASIL



Gaea Condiment Of Extra Virgin Olive Oil With A Dash Of Basil

Greece, Feb 2019

DILL



Monini Dill Flavored Extra Virgin Olive Oil

Russia, Feb 2019

HERBS DE PROVENCE



Pere Olive Olives Vertes Poivrons Et Herbes De Provence: Green Olives With Pepper And Herbs De Provence

France, Jan 2019

Growing awareness around exotic olive oil flavors

SMOKED



Latzimas Olivenöl Mit Rauchigem Geschmack: Olive Oil With A Smoky Flavor

Germany, Feb 2019

CHOCOLATE



Don Gastronom Aromatisiertes Natives Bio-Olivenöl Extra Schokolade: Organic Extra Virgin Olive Oil With Chocolate

Germany, Nov 2018

CAYENNE PEPPER & SPICES



Borges Aceite De Oliva Con Pimienta De Cayena Y Especies: Olive Oil With Cayenne Pepper And Spices

Spain, Feb 2019

Transparency is paramount to keep consumers informed

- After several fraud scandals involving olive oil products in the last years, consumer skepticism has increased. In this context, transparency is paramount to keep consumers informed. Manufacturers are investing in storytelling to explain production details and provide this transparency to their products.



Olivas Sevillanas: Sevillanas Olives

Germany, Jan 2019

CLAIMS Due to its excellent taste, the manzanilla is the most popular food olive in the world. **The traditional place of origin of this species is the village of Dos Hermanas in Sevilla. Only the drupes of the highest class of trade culminate in the selection of more manzanilla sevillana.** Suitable for vegans. Green Dot Certified.



Maestros De Hojiblanca Aceite De Oliva Virgen Extra A Nuestra Tierra: Extra Virgin Olive Oil

Spain, Dec 2018

CLAIMS Fruity (3 degrees). Spicy (1 degree). Olive oil of superior category obtained directly from olives and only by mechanical procedures. **The quality of our products is essential for us, that is why we adopt physical and chemical standards that are higher than those that are the law.** Green Dot Certified. Recyclable packaging.



Maille Huile D Olive De Provence: Olive Oil Of Provence

France, Jan 2019

CLAIMS ... This extra virgin olive oil is **extracted cold from several varieties of olives: Aglandau, Bouteillan and Salonenque, harvested in the geographical area AOC Provence. This specific blend of olives gives this oil intense and herbaceous fruity notes.** Ideal for seasoning your salads, or filleted on hot dishes such as fish or grilled vegetables.

Key learnings & What's next ?



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Key learnings & What's next ?

Create differentiation is key

Either through a special packaging or an unique terroir, traditional olive-based products that differs from the ordinary stand out of the shelves. Handpicking olives or cold-pressing them makes for premium products with positive processing. Consumers demand improved experiences, and the use of limited editions is becoming more popular - early harvest editions are examples of this trend.

New flavor experience

From fruit and herbs to the more exotic ones like vanilla or chocolate, olive-based products can be the base for countless flavor innovations. New flavors also have an appeal among younger consumers seeking new experiences.

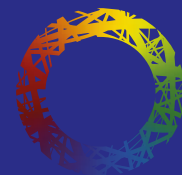
Ethics are paramount

The growing concerns towards environment and social responsibility will continue to innovate olive-based traditional products industry. Sustainable initiatives have a growing importance to attract millennial and gen z attention, however, transparency is important to keep consumers informed about these practices. There are opportunities to target this generation by investing in new packaging, sponsoring associations and promoting sustainable production good practices.

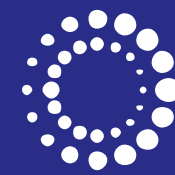
Clean label claims on the rise

Traditional olive-based innovation is getting more organic and natural. Organic claim penetration in traditional olive-based products has increased 10.7% on average in the last five years in Europe (CAGR, 2014-2018), signalling consumer demand for clean label products.





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