

Global Olive Oil Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 22.8 bn
Forecast (2031)	USD 31.6 bn
CAGR (2021-2031)	5.6%
Study period	2021-2031
Largest region	Europe · 45.2%
Fastest-growing region	Asia-Pacific · 7.4%
Market concentration	Low
Licence	Individual / Company

The global olive oil market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Extra virgin olive oil accounts for XX% of market value as consumers, retailers and foodservice operators prioritize flavor, provenance and minimally processed oils. Europe remains the largest regional market with a XX% share, while Asia-Pacific records the fastest growth at XX% annually. Supply normalization after the 2023/24 shortage cycle is restoring consumption, promotional activity and branded-product investment across major importing markets.

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Executive summary

The global olive oil market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Extra virgin olive oil accounts for XX% of market value as consumers, retailers and foodservice operators prioritize flavor, provenance and minimally processed oils. Europe remains the largest regional market with a XX% share, while Asia-Pacific records the fastest growth at XX% annually. Supply normalization after the 2023/24 shortage cycle is restoring consumption, promotional activity and branded-product investment across major importing markets.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- World olive oil production reached XXX tonnes in 2024/25, XX% above the preceding crop year, according to the International Olive Council.
- Global consumption reached approximately XXX tonnes in 2024/25 and is expected to rise to XXX tonnes in 2025/26, according to the International Olive Council.
- International olive oil exports reached a record XXX tonnes in 2024/25, increasing XX%, according to the International Olive Council.
- Extra virgin olive oil represented XX% of global market value in 2025 and is forecast to grow at XX% annually through 2031.
- Europe held XX% of 2025 revenue, supported by high household penetration and the concentration of production, bottling and protected-origin portfolios.
- Asia-Pacific will grow at a XX% CAGR as modern retail, e-commerce and Mediterranean-diet positioning expand the consumer base.
- Glass bottles led packaging with XX% of value, while bag-in-box and flexible formats recorded the fastest packaging growth at XX%.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Olive Oil Market Trends and Growth Drivers

The olive oil market entered 2026 with a materially stronger supply position than during the 2023/24 shortage. The recovery reopens price points and promotional mechanics that had disappeared from retail, allowing household volume to rebuild while premium extra virgin products preserve much of the value ladder created during scarcity.

Demand is becoming geographically broader and commercially more segmented. Traditional Mediterranean consumption remains the volume anchor, but incremental value increasingly comes from United States households, Asian urban consumers, premium foodservice and shoppers seeking documented origin, harvest timing and sustainable cultivation.

Climate variability remains the market’s defining structural risk. Procurement diversification, irrigation efficiency, mechanized high-density groves, storage capacity and disciplined blending are therefore moving from operational considerations to board-level determinants of market share and profitability.

Growth drivers

Mediterranean diet adoption broadens household use

Olive oil is moving beyond Mediterranean cuisine into everyday sautéing, baking, dressings and finishing applications. Health-led category education and greater recipe exposure increase household penetration in North America, Asia-Pacific and urban Latin America, with the largest value benefit accruing to extra virgin products.

Harvest recovery restores affordability and promotions

The 2024/25 production rebound replenished inventories and reduced the extreme raw-material pressure created by two weak Mediterranean harvests. Lower shelf-price barriers, renewed retailer promotions and improved foodservice margins are accelerating volume recovery without fully reversing the premium price architecture established during scarcity.

Extra virgin premiumization lifts category value

Consumers increasingly differentiate oils by grade, cultivar, origin, harvest timing and sensory profile. Producers and bottlers use single-estate, early-harvest, organic and protected-origin claims to raise realized prices and reduce direct comparability with commodity oils.

Modern retail and e-commerce improve access

Supermarkets, warehouse clubs and digital marketplaces are extending olive oil assortments beyond major metropolitan areas. Searchable origin information, reviews, subscriptions and direct-to-consumer discovery particularly benefit premium and specialist brands in markets where traditional distribution remains fragmented.

Foodservice upgrades culinary oil specifications

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Premium restaurants, fast-casual Mediterranean concepts and hospitality operators increasingly feature olive oil as both an ingredient and a visible quality signal. Bulk extra virgin and blended-origin programs allow operators to improve flavor credentials while controlling serving costs.

Traceability and sustainability support differentiation

Mill-level traceability, certified farming practices and protected geographical indications translate agricultural practices into defensible commercial claims. These systems strengthen retailer confidence, support export access and create premium tiers for suppliers able to document origin and environmental performance.

Restraints

Climate volatility destabilizes supply

Heat, drought and irregular flowering can alter Mediterranean output sharply between crop years, affecting availability, working capital and pricing. Companies concentrated in a single origin face greater risk of lost shelf space and margin compression than suppliers with diversified sourcing and storage.

Price gap limits mass-market conversion

Olive oil remains substantially more expensive per litre than sunflower, soybean, canola and blended cooking oils in many markets. The gap constrains everyday frying usage and makes entry-level consumers sensitive to pack size, promotions and economic conditions.

Authentication failures weaken consumer trust

Mislabeling, grade deterioration and origin disputes can undermine confidence across the entire category. Compliance testing, sensory panels and secure batch records raise operating costs but are essential for protecting branded premiums and retailer listings.

Trade and currency exposure raises landed costs

A large share of consumption outside the Mediterranean depends on imported oil, creating exposure to exchange rates, tariffs, container availability and port costs. Sudden landed-cost movements complicate promotions and increase the working capital required to maintain supply continuity.

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Olive Oil Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Mediterranean diet adoption broadens household use	XXX	XXX	XXX
Harvest recovery restores affordability and promotions	XXX	XXX	XXX
Extra virgin premiumization lifts category value	XXX	XXX	XXX
Modern retail and e-commerce improve access	XXX	XXX	XXX
Foodservice upgrades culinary oil specifications	XXX	XXX	XXX
Traceability and sustainability support differentiation	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Climate volatility destabilizes supply	XXX	XXX	XXX
Price gap limits mass-market conversion	XXX	XXX	XXX
Authentication failures weaken consumer trust	XXX	XXX	XXX
Trade and currency exposure raises landed costs	XXX	XXX	XXX

Source: XXX

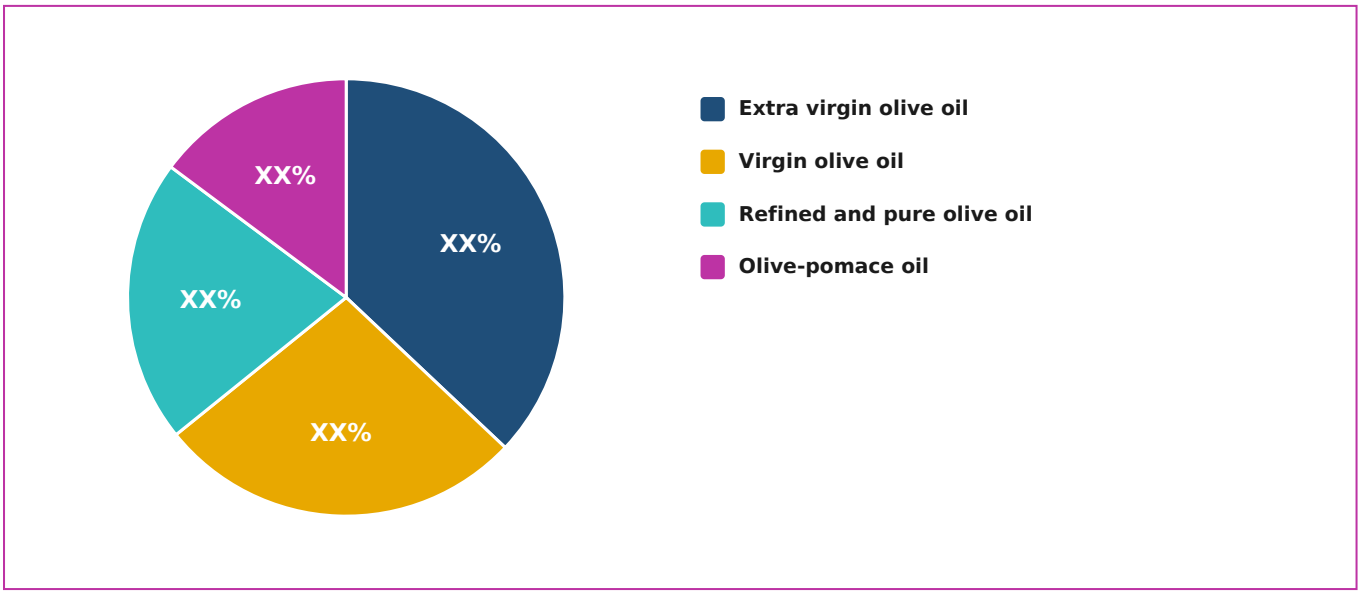
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Olive Oil Market Segmentation by Grade, Packaging, Channel and End Use

By Product Type

Extra virgin oil captures the largest value share because it combines culinary use with flavor, health, provenance and gifting credentials. Refined or pure olive oil remains important in price-sensitive cooking and foodservice applications, while virgin oil occupies a narrower mid-tier. Olive-pomace oil grows primarily in high-heat foodservice and industrial applications where cost and technical performance outweigh premium positioning.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Extra virgin olive oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Virgin olive oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Refined and pure olive oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Olive-pomace oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

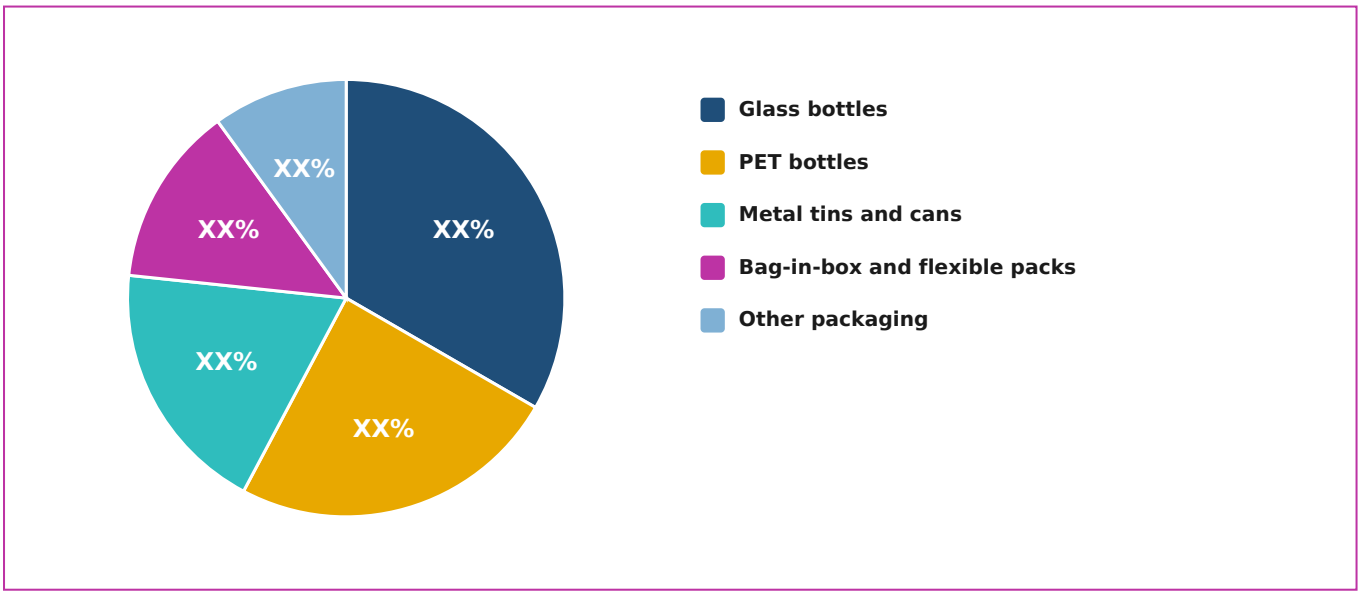
By Packaging

Glass leads because premium retailers and consumers associate it with quality, recyclability and product protection, particularly when dark-colored bottles are used. PET remains essential for family packs and

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price-led retail because of its low weight and breakage rate. Metal tins retain strong Mediterranean, foodservice and gifting relevance, while bag-in-box gains from oxygen protection, shipping efficiency and larger-format convenience.

Value share by packaging, 2025



Source: XXX

Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Glass bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
PET bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Metal tins and cans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bag-in-box and flexible packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets lead through broad availability, private-label development and frequent price promotion. Traditional grocery remains influential in Mediterranean, Middle Eastern and Latin American markets, while specialist stores over-index in protected-origin and single-estate products. Online retail is the fastest-growing channel because it supports assortment depth, producer storytelling, reviews and repeat-purchase subscriptions.

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Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traditional grocery and convenience	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialist stores and direct sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End Use

Household cooking and finishing dominate because packaged retail products command the highest value per litre. Foodservice demand is recovering with restaurant traffic and Mediterranean menu expansion, while food manufacturing uses olive oil in sauces, bakery, preserved foods and premium prepared meals. Personal-care and pharmaceutical uses remain smaller but benefit from demand for recognizable plant-derived ingredients.

Value by end Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Household	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Personal care and pharmaceuticals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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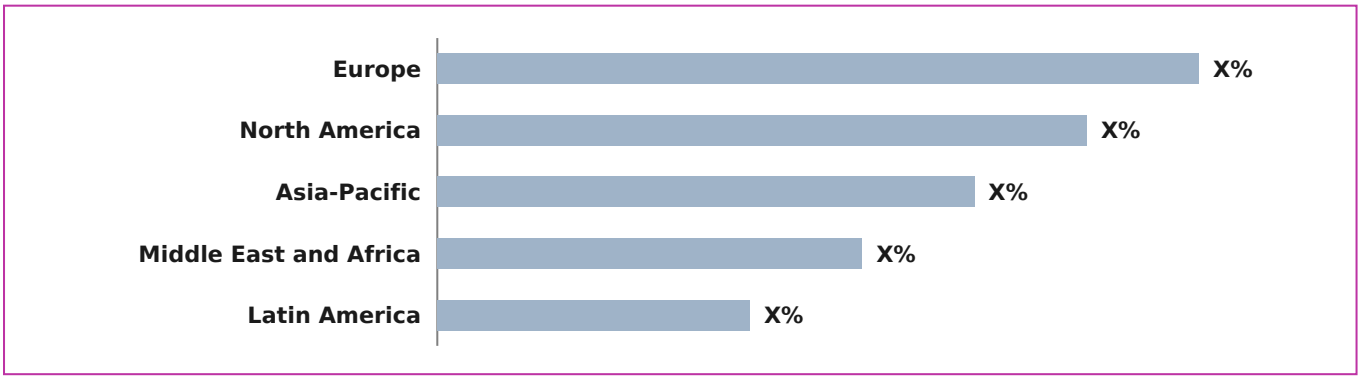
Olive Oil Market Regional Analysis and Country Outlook

Europe generated XX% of global market value in 2025 and remains the center of production, consumption, blending and premium brand development. Spain provides the industry's largest scalable supply base, while Italy commands high retail realization through premium branding and origin architecture. Portugal continues to gain production relevance through irrigated, mechanized groves, and Greece retains strong export potential in extra virgin oil despite a comparatively high share of bulk trade.

North America accounts for XX% of value, led by the United States, the world's pivotal non-producing import market. Category growth is supported by greater household penetration, premium retail assortments and local bottling investment, although landed cost and exchange-rate movements remain important. Latin America combines mature consumption in producing countries with import-led growth in Brazil and Mexico.

Asia-Pacific is forecast to grow at XX% annually through 2031. Japan provides an established premium base, while China, South Korea and India offer a longer household-conversion runway through e-commerce, gifting, health positioning and smaller pack sizes. The Middle East and Africa combine major producing markets such as Tunisia, Türkiye and Morocco with high-consumption Gulf import markets and expanding modern retail.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Olive Oil Market Competitive Landscape and Company Share

The global market is structurally fragmented across agricultural producers, cooperatives, millers, bulk exporters, private-label packers and consumer brands. Deoleo, Dcoop/Pompeian, Sovena, Salov, Acesur and Borges possess multinational scale, but thousands of regional mills and protected-origin producers keep overall concentration low. The five largest branded and vertically integrated groups captured an estimated XX% of global value in 2025.

Competitive advantage is increasingly built on access to diversified oil pools, blending expertise, quality laboratories, working-capital capacity and retailer relationships. Deoleo competes through brands including Bertolli, Carbonell and Carapelli; Dcoop and Pompeian link cooperative supply with a leading United States platform; and Sovena combines private-label strength with farming, crushing and packaging assets.

Strategic investment has shifted toward U.S. bottling capacity, Californian groves, premium brand portfolios, sustainable mill networks and consumer-facing traceability. Cobram Estate's expansion and acquisition activity, Pompeian's Baltimore investment and Deoleo's 2025–2028 EVOO-lution program illustrate the sector's movement toward vertically coordinated supply and higher-margin branded growth.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Deoleo S.A.	XXX	XXX	XXX	XXX
Dcoop Group	XXX	XXX	XXX	XXX
Pompeian, Inc.	XXX	XXX	XXX	XXX
Sovena Group	XXX	XXX	XXX	XXX
Salov S.p.A.	XXX	XXX	XXX	XXX
Acesur Group	XXX	XXX	XXX	XXX
Borges Agricultural & Industrial Edible Oils	XXX	XXX	XXX	XXX
Migasa Aceites S.L.U.	XXX	XXX	XXX	XXX
Cobram Estate Olives Limited	XXX	XXX	XXX	XXX
Colavita S.p.A.	XXX	XXX	XXX	XXX
Monini S.p.A.	XXX	XXX	XXX	XXX
CHO Group	XXX	XXX	XXX	XXX

Source: XXX

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Olive Oil Market Forecast, Investment Priorities and Opportunities

The market will advance from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will normalize after the post-shortage rebound, while mix improvement from extra virgin, protected-origin, organic and early-harvest oils sustains value growth above population growth.

The central forecast assumes Mediterranean production reverts toward long-run averages but remains more variable than before 2020. A favorable-harvest scenario would accelerate household recruitment and foodservice conversion through lower prices; a renewed drought scenario would protect nominal value but suppress consumption and intensify substitution toward competing oils.

Winning suppliers will combine multi-origin procurement with consistent sensory standards, strong quality verification and packaging suited to specific usage occasions. Incremental profit pools will center on premium retail, digitally enabled specialty brands, retailer partnerships, Asian urban consumers and foodservice formats that make cost per serving transparent.

Opportunities

- Premium extra virgin oils in the United States and Asia-Pacific
- Single-dose, spray, bag-in-box and refill packaging
- High-density and super-high-density olive groves
- Carbon-accounted and regenerative production systems
- Private-label partnerships with major retailers
- Foodservice formats tailored to frying, finishing and delivery kitchens
- Traceability platforms linking batches to mills and harvests

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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