



ACEITES DE OLIVA
DE ESPAÑA

JUNE 2025

U.S. CAMPAIGN BRIEFING. OLIVE OILS FROM SPAIN

1. BRAND AND MARKET OVERVIEW

www.aceitesdeolivadespana.com

The Spanish Olive Oil Interprofessional is a non-profit organisation that brings together all the key players in the Spanish olive oil industry. Its primary mission is to promote this product around the world. Under the umbrella of its brand **Aceites de Oliva de España [Olive Oils from Spain]**, the organisation has been running international promotional campaigns for over 16 years, reaching consumers across six continents. These campaigns are focused primarily on reinforcing Spain's image as the global leader in both the quality and quantity of olive oils produced and sold.

The Organisation has launched a new Regulation Extension for the 2024/2025 to 2028/2029 campaigns, aiming to boost the consumption of Olive Oils from Spain and drive innovation within the industry. Over 80% of the funds are allocated to promotional campaigns, both in Spain and abroad.

MARKET: USA CHALLENGER.

Objective: to challenge the leader in bottled olive oil: Italy.

Italy holds the undisputed position as category leader in the U.S. and German markets in consumers' minds, largely due to its shelf presence.

Its offering is synonymous with quality olive oil.

There is no clear challenger.

MARKET

U.S. Department of Commerce, Census Bureau

In the past year (April 2024 to March 2025), imports from Spain accounted for 34.73% of the total volume, reaching 145,074 tons according to data from the U.S. Department of Commerce, Census Bureau.

By value, they represented 35.29%, exceeding €1,013 million.

The main competitors by volume included: Italy (30.13%), Tunisia (17.41%), Turkey (7.22%), Greece (2.81%), Argentina (2.51%), Portugal (1.10%), Morocco (1.07%), Chile (1.05%) and Lebanon (0.73%).

It is important to note that the recorded country of origin for imports currently does not accurately reflect the true origin of the product. A significant portion of imports recorded as originating from Italy are actually olive oils produced in Spain.



In the first four months of the year, our exports suffered another cut of 15.08% compared to the same period in 2024, totaling 2,662 tons. Total imports dropped by 2.76%.

It remains to be seen how negotiations between the E.U. and the U.S. will unfold regarding the threat of a 30% tariff announced by the U.S. administration, which would affect Olive Oils from Spain.

2. PRODUCT / BRAND TRUTHS

PRODUCT (Extra Virgin Olive Oil, EVOO)

- There are varieties with distinct organoleptic characteristics that guarantee a unique experience.
- Olive Oils from Spain offer organoleptic profiles rich in nuance, suitable for all tastes and palates.
- The Olive Oil category on shelves in the United States is led by Italy, presenting an opportunity to position Olive Oils from Spain by elevating their origin, unique flavor and distinctive character.

Italy, the Icon

- **Italy is positioned as the undisputed benchmark** for Olive Oil in the minds of consumers in the United States.
- Its association with quality, tradition, and culinary excellence has solidified its image as synonymous with high-quality olive oil.

No competitor is currently seen as a serious challenger to its leadership; this dominance reinforces its prestige and iconic status within the category.

Flavor as a Decision Driver

- Olive oil is perceived as a premium category.
- Health is a key factor for category entry, but it acts as a hygiene factor in terms of choosing origins and brands. In contrast, **flavor is a decisive factor**, especially when used fresh without heating, where premium and EVOO take center stage.
- Moreover, **as markets mature, flavor richness becomes an increasingly important driver** in purchase decisions.
- There is a risk of alienating some consumers who reject a pronounced flavor, but this risk is outweighed by the opportunity to build differentiation for a brand like Olive Oils from Spain, which currently has low consumer recognition and presence on shelves.



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BRAND

Passion and Character

- It captures the essence of Spain's unique way of living well. Spain, as a brand, embodies passion, sensuality, bold character, and a richness of diversity and subtle complexity.
- The Spain brand is globally recognized and admired. As an epicenter of passion and authenticity, it embodies unique and differentiating values such as strength, character, expressiveness, and an unmistakably sexy allure.
- With iconic figures like Dalí and Javier Bardem as references, Spain stands out as a beacon of quality, excellence, and the art of living, creating a legacy and a brand that seduces and captivates.

PERSONALITY & PROFILE

Profile: LOVER

Passionate, magnetic and mysterious. Seductive and provocative, blending intensity and character with unique sophistication.

Enjoys the art of living well, nurturing themselves while savoring every moment, with a passion that drives them to explore the best life has to offer.

TONE OF VOICE

Alluring / seductive / passionate

Speaks with magnetism and captivates with a confident, immersive style. Authentic and engaging, with a hint of provocation.

BRAND PURPOSE

To reveal the unparalleled character of Olive Oils from Spain so you can fully savor the olive oil experience.

BARRIERS:

- An overly intense flavor can be off-putting for some consumers, which is why it's crucial to distinguish expressiveness (nuance, organoleptic breadth) from intensity. Not all our varieties are necessarily more intense. What they are, however, is less flat—more varied and more expressive—than their Italian counterparts.
- Limited shelf presence: Italian Olive Oil is often chosen by default, while Olive Oils from Spain remains relatively unknown and scarcely represented on shelves.

OPPORTUNITIES:

- Olive oils from a single origin versus blends from various origins. This presents a strong opportunity for Olive Oils from Spain, in contrast to oils bottled and exported from other markets.



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3. BRAND AND BUSINESS OBJECTIVES

- Raise the value of Olive Oils from Spain to match Italy's price index.
- Build brand differentiation and challenge the category leader (Italian Olive Oil).

Behavior to shift: consumers choosing Olive Oils from Spain over other origins. While Spanish-origin labels are currently limited on shelves, we are committed to elevating the Spain brand's prestige in the long term. This will help shape consumer preference, influence how the Spain brand is labeled within current offerings, strengthen our negotiating position and clout within distribution channels, and ultimately expand the on-shelf presence of the Spain brand through new labels.

– Storytelling must be genuinely distinctive.

***Worth noting: The Mediterranean concept and distinctive flavor profile are widely shared in the category. While the nuanced varieties and flavor richness may stand out for Spanish consumers, it's unclear whether this would create enough differentiation for American consumers. Tapping into associations that American consumers already link with leadership and quality may offer that key differentiator.*

BRAND AMBITION:

– Position Olive Oils from Spain as a challenger to Italy, setting the groundwork to build awareness and distinctiveness for the Spain brand.

*** The agency is expected to provide an in-depth analysis of the Italy brand from a strategic marketing perspective within this market—understanding its strengths and weaknesses, advertising spend, channels, tactics, key opinion leaders and partnerships, etc.*

BUSINESS AMBITION:

– Bring Olive Oils from Spain to parity with Italian oils on the price index.

4. TARGET AUDIENCE

– **Younger adults who currently use other fats and oils** in dishes where fresh, unheated olive oil could be used as an alternative, and who are familiar with (but not resistant to) olive oil. A group that shows a degree of curiosity—concerned about their health, and with a genuine appreciation for food and flavor.

– **Urban, curious foodies.** They see culinary exploration and enjoyment as a way to unwind—but often default to familiar choices like Italian olive oil, simply because they're unaware of the distinct qualities and uses of other alternatives. They're motivated by travel, trendspotting, and taking care of their wellbeing, but they need inspiration and guidance to integrate authentic products into their everyday routine in a more mindful and versatile way.



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SOCIAL TENSION

– The comfort of the familiar vs. the thrill of stepping outside your comfort zone

Familiarity offers reassurance and control but also keeps us in a safe zone that limits our enjoyment. Daring to try something new might feel uncomfortable, but it opens up new perspectives, enriches our experience and reshapes how we live and savor life.

5. STRATEGIC APPROACH

A dual strategy:

– Primary objective: Strengthen the Spain brand among households that already use olive oil (expanding occasions for its use).

– Secondary objective: Expand the category by increasing use among non-users of olive oil.

FULL EXPERIENCE



Quiero comer más saludable sin dejar de disfrutar de mis comidas y sé que el Aceite de Oliva es un aliado fundamental, tanto en platos fríos donde busco un sabor especial, como en platos calientes donde puede jugar un papel importante en la calidad y sabor del plato terminado.

Sin embargo, siento que entiendo poco del mundo del Aceite de Oliva: no sé distinguir sabores ni variedades y por desconocimiento o costumbre acabo comprando siempre las mismas marcas de los mismos países.

Desde España queremos enriquecer tu paladar y tus comidas con una de nuestras grandes pasiones y obsesiones: la elaboración de Aceites de Oliva. Somos un pueblo pleno de carácter y repleto de diversidad y matices, y los Aceites de Oliva son nuestra especialidad local, un reflejo de nuestra forma de vivir la vida. Por eso cuando pruebas Aceites de Oliva de España, conectas con la experiencia total del AO: desde el atrevimiento y sutil picor del picual, a el carácter alegre y frutal de la arbequina hasta la personalidad fresca y persistente de nuestra variedad hojiblanca.

Abre tu mundo a nuevas experiencias, eleva tus platos y vive la experiencia máxima de los Aceites de Oliva. Aceites de Oliva de España, *taste the experience*/ Saborea la experiencia (en español).



Translation of 'FULL EXPERIENCE'

"I want to eat more healthily without sacrificing the enjoyment of my meals, and I know olive oil is a key ally—whether in cold dishes where I want a special flavor, or in hot dishes where it can play an important role in enhancing the quality and taste of the final dish.

That said, I feel I don't really understand the world of olive oil: I struggle to distinguish between flavors or varieties, and out of habit—or simply lack of knowledge—I always end up buying the same brands from the same countries."

From Spain, we invite you to elevate your meals—and your palate—with one of our greatest passions: the art of olive oils. Our culture is rich in character, diversity and subtle complexity, and olive oil is our local specialty—a reflection of how we live life. When you



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taste Olive Oils from Spain, you connect with the full experience of olive oil: from the bold intensity and peppery finish of the *Picual* variety, to the bright, fruity notes of *Arbequina*, and the fresh, lingering charm of *Hojiblanca*.

Discover new flavors, elevate your cooking and enjoy the full experience of olive oils. **Olive Oils from Spain, taste the experience / Saborea la experiencia (in Spanish).**

6. REASONS WHY

- Global leaders: In quality, production, exports and awards.
- Flavor richness: Varieties with unique organoleptic profiles compared to other producing countries—thanks to climate and growing conditions. (**FLAVOR**)
- Single origin (not blended with oils from other producing countries)
- National treasure: World's largest producer, largest cultivated area, decades of professionalization, and a sector of major economic and social importance.
- Spanish character: Passionate, expressive, sensual—never goes unnoticed.

Complementary benefits:

- Health properties (**HEALTH**)
- The largest human-cultivated forest on the planet: biodiversity, CO₂ capture, efficient water use. (**SUSTAINABILITY**)
- Spain is associated with joy, wellbeing and a zest for life. A country where work and leisure find balance, anchored in friendship.
- Meals reflect this spirit of “healthy enjoyment”—they're unhurried, sun-drenched, often by the sea and shared with friends outdoors.
- Versatility of the product

7. EXECUTIONAL REQUIREMENTS

- The campaign will focus on the EVOO (Extra Virgin Olive Oil) category in all messaging and communication; however, all creative assets must be signed off with the brand name Olive Oils from Spain — always in the plural form.
- Promote fresh, unheated use of EVOO in: Top local dishes (primary focus) / iconic Spanish uses (secondary focus)
- Communicate specific health benefits
- BTL experiential activations to offset the absence of Spain brand shelf presence.
- Define a mix of activations in target countries, and inbound tourism activations in Spain, to leverage the emotional affinity visitors already feel for the country, offer hands-on product experience, ensure quality control in execution and create synergy with local-market campaigns.
- We need endorsers with emotional impact, but using prestigious Spanish figures is already overused. While they may generate engagement, they tend to lack credibility—audiences don't expect them to be critical of their own country. We believe it's more effective to find American personalities who can use local cultural



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cues to communicate the Olive Oils from Spain brand's unique value in a more credible and relevant way.

8. CONTENT & FORMATS TO BE DEVELOPED

- To be defined according to the agency's creative and tactical proposal

9. TIMING & BUDGET

- Duration: November 2025 to December 2028. If the agency considers it strategically interesting to start in 2026, they must state their reasoning and propose their specific retrotiming.
- Budget: €20,300,000
- The Spanish Olive Oil Interprofessional Organization reserves the right to choose the creative strategy and media plan separately for different agencies.

10. GEOGRAPHIC SCOPE

- NY State + (we expect the Agency recommendation)

11. PITCH TIMELINE

- Publication of the pitch: July 22nd, 2025
- Deadline for confirming participation: July 30, 2025
- Deadline for submission of proposals: September 5, 2025, before 3:00 p.m. (Madrid Time)
- Submission of finalist proposals: September 10-11 and/or 12, 2025. Proposal submission dates will be coordinated with the selected agencies.
- Deadline for the resolution of the competition: September 30, 2025
- The Spanish Interprofessional Olive Oil Organization reserves the right to declare the competition void if no proposal meets its needs.

12. DOCUMENT LENGTH

- No more than 70 slides, including appendices.
- Separate Excel file with budget, itemised by unit cost. Fees must be broken down and clearly explained, including any percentages (taxes), first- or second-tier suppliers, or any anticipated cost involved in carrying out the proposed actions.

13. PROPOSAL EVALUATION CRITERIA

(Maximum score: 100%. Minimum score for shortlisting: 60%)

1– Creative Strategy (40%)

A) Message and graphic expression must align with the proposed communication strategy and media mix. Use of the most current and cost-effective formats, with consistency across proposed media channels.



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B) Local, current, meaningful, disruptive, impactful, and memorable.

2– Technical Quality of the Project (25%)

- A) Quality and relevance of market analysis.
- B) Alignment of program strategy, objectives, and key messages.
- C) Appropriate selection of activities relative to the program’s goals and strategy, balanced media mix, and synergy among activities.
- D) Concise description of the activities.
- E) Budget broken down by area and unit costs. Specify the fee per area and the agency’s total fee.

3– Quality of Management and Service (10%)

- A) Organisation and structure of project management.
- B) The team assigned to the project: service and specialists who guarantee top performance.
- C) Quality control mechanisms, measurement, evaluation, and monitoring to ensure campaign efficiency, goal attainment, and full program execution.
- D) Reporting: weekly and monthly deliverables with detailed metrics, strategic analysis, conclusions, recommendations, and improvements. Excellent availability for clarification or video calls with the technical team.

4. Profitability (25%)

- A) Appropriate allocation of the budget in relation to the objectives and scope of the activities.
- B) Consistency between estimated costs and deliverables.
- C) Realistic estimate of person/day/profile for activities implemented by the agency.

14. AGENCIES ELIGIBLE TO PARTICIPATE IN THE PITCH

A local agency in EE: UU: is required to lead creative development, strategy, media planning, and campaign execution (this is a mandatory requirement for participation).