



Study on economic value of EU quality schemes, geographical indications (GIs) and traditional specialities guaranteed (TSGs)

Leaflet



With subcontractors

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OBJECTIVES: PROVIDE ECONOMIC DATA ON EACH OF THE 3207 GIs AND TSGs REGISTERED IN EU28 UP TO 2017

Previous studies conducted for the European Commission (EC) provided economic data (volume, value and trade) on GIs over the period 2005-2010 and analysis on price and value premium. The present study aimed at updating these data for the period 2011-2017 for each GI/TSG.

The study covered the 3 207 GIs/TSGs registered in the 28 Member States (MS) of the EU until the 01/01/2017. It covers the following sectors:

- Agricultural products and foodstuffs (PDOs, PGIs and TSGs) – 1 367 products (43% of all GIs/TSGs)¹.
- Wines (PDOs/PGIs) – 1 576 products (49% of all GIs/TSGs)².
- Spirit drinks (GIs) – 259 products (8% of all GIs/TSGs)³.
- Aromatised wine products (GIs) – 5 products (0.2% of all GIs/TSGs)⁴.

Compared to the 2012 study, the main changes in scope are:

- Introduction of 54 TSG products;
- Accession of Croatia to the EU, introduction of 38 registered product names;
- Registration of 520 new products names between 01/01/2010 and 01/01/2017;
- Removal from the register of 87 spirit drinks, 24 German mineral waters and 3 German beers.

SALES VALUE OF GIS/TSGS REACHED EUR 77 BILLION IN 2017

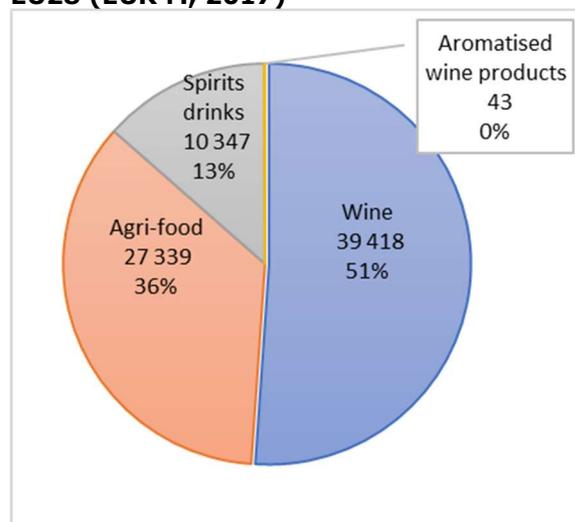
The estimate of sales value of GI/TSG products in 2017 was EUR 77.1 billion in EU28 (EUR 74.8 billion excluding TSGs), accounting for 7% of the total food and drink sales (EUR 1 101 billion at EU 28).

Wines accounted for 51% of this value, 35% is covered by agricultural products and foodstuffs, spirit drinks accounted for 13%, while aromatised wine products for 0.1%.

The sales value of the 3 153 PDO and PGI products reached a value of EUR 74.76 billion in 2017.

The 54 TSGs (agricultural products and foodstuffs) generated a value of EUR 2.7 billion in 2017.

Sales value of GIs/TSGs by category in EU28 (EUR M, 2017)



Source: AND-International study for the EC

Excluding the UK, the total sales value of GI/TSG products reached EUR 69.4 billion in EU27 in 2017.

¹ Regulation (EU) 1151/2012
² Regulation (EU) No 1308/2013
³ Regulation (EC) No 110/2008
⁴ Regulation (EU) No 251/2014

Sales value of GIs/TSGs in EU28 between 2010 and 2017

Sales value in EUR M	2010	2017	% in total 2017	AAG ⁵	Evol. 2017/2010
Total GIs (excl. TSGs)	54 513	74 759	97%	4.6%	37%
Total GIs+TSGs	54 513 ⁶	77 148	100%	5.1%	42%

Source: AND-International study for the EC

The total sales value covered by GIs/TSGs has grown by 42% since 2010.

Wine sales value covered by GIs has increased by 33%. It has contributed to 43% of the growth particularly thanks to the increase of French, Italian and Spanish wines (79% of the wine growth contribution)

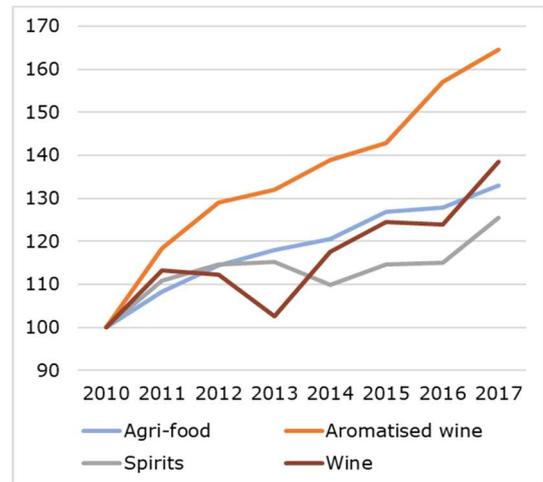
The **agricultural products and foodstuffs sector** has undergone the greatest increase (+65%) since 2010 and accounted for almost half of the growth observed over the 2010-2017 period. The change of scope with the registration of new GIs and with the inclusion of TSG productions contributed to 32% of this growth. Growth is also

related to an increase in sales value for agri-food products under GIs in the UK, IT and FR.

Spirit drinks grew by 25% but only accounted for 9% of the growth; mostly due to an increase in French spirit drinks.

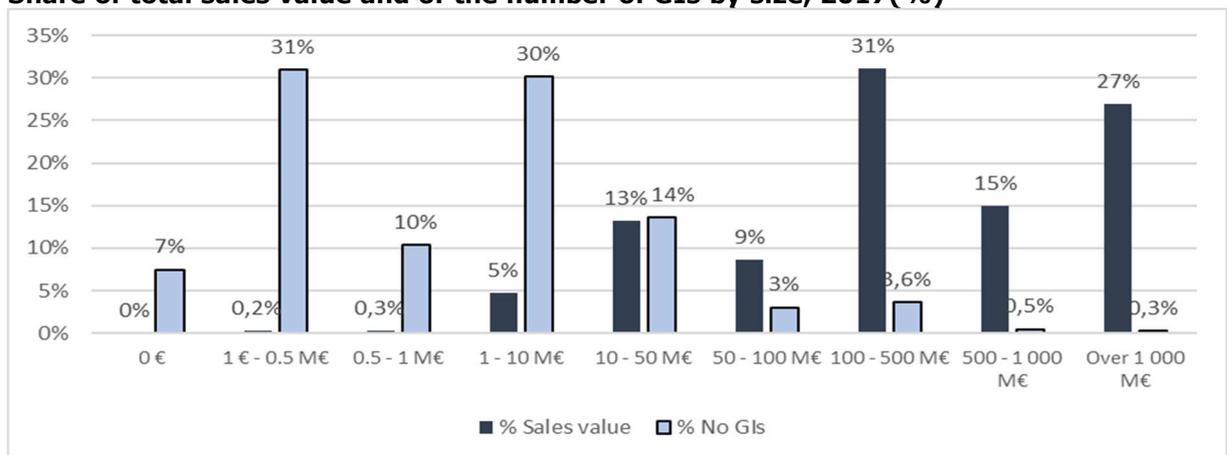
Finally, **aromatised wine products** represented 0.1% of total sales value and did not contribute to the growth although this category has grown by 39% since 2010.

Evolution of sales value under GIs/TSGs by regulation (Index 100 = 2010)



Source: AND-International study for the EC

Share of total sales value and of the number of GIs by size, 2017(%)

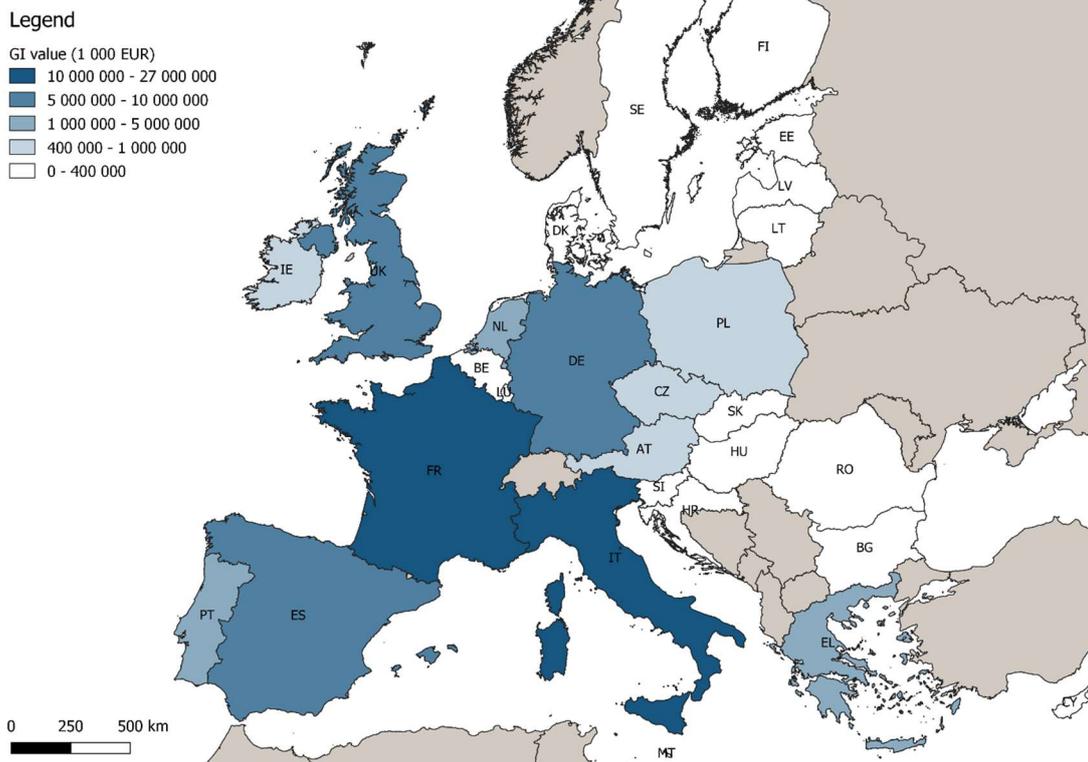


Source: AND-International study for the EC

⁵ Annual average growth

⁶ In 2010, the value of TSGs was not included in the data collection.

Mapping of the EU28 according to the national GIs sales value in 2017 excluding TSGs



Source: AND-I study for the EC

SALES VALUE BY SECTOR

Wines: EUR 39 billion

The sales value of wine under GIs at EU28 level was EUR 39.4 billion in 2017 and has increased by 33% since 2010. The volume of sales has grown to a lesser extent to reach 89.7 Mhl in 2017 (+4% since 2010).

In 2017, PDOs accounted for the largest share of GI wine production with respectively 71% of the sales volume and 84% of the sales value.

Five MS accounted for 90% of the EU28 sales volume and 95% of the EU28 sales value in 2017: France, Italy, Spain, Germany and Portugal.

In 2017, national markets remained the largest GI wine market with 59% of the sales value, followed by the extra-EU market that accounted for 22% and intra-EU trade with 20%. **Over the 2010-2017 period, extra-EU trade largely increased (+70% in value)** while national consumption and intra-EU trade remained relatively stable in volume (respectively -4% and +4%) but grew in value (respectively +27% and +21%).



Agricultural products and foodstuffs: EUR 27 billion

In 2017, the total sales value reached **EUR 27.34 billion for GIs and TSGs in EU28**. Excluding TSGs, the total sales value of agri-food products under GIs reached EUR 24.95 billion in EU28 in 2017.

PGI products were the largest agri-food products category and accounted for 53% of the EU28 sales value in 2017; while PDO and TSG products represented respectively 38% and 9% of the total sales value.

Italy, Germany and France were the top three Member States for agri-food products sold under GIs/TSGs and gathered **65% of the total sales value in 2017** and 47% of the total number of GIs/TSGs registered.



Sales value of agricultural products and foodstuffs under GIs in EU28 (EUR M)

Agri-food sales value (EUR M)	2010	2017	% in total 2017	AAG	Evol. 2017/2010	% in growth 2010/2017
Cheeses	6 308	8 993	36%	5.2%	43%	32%
Meat products	3 190	3 955	16%	3.1%	24%	9%
Beers	2 859	3 327	13%	2.2%	16%	6%
Fresh meat (and offal)	1 515	2 980	12%	10.1%	97%	18%
Fruit, vegetables and cereals	986	1 940	8%	10.2%	97%	11%
Fresh fish, molluscs, and crustaceans	443	1 109	4%	14.0%	150%	8%
Other products of Annex I	369	852	3%	12.7%	131%	6%
Bread, pastry, cakes etc.	279	567	2%	10.7%	104%	3%
Oils and fats	348	555	2%	6.9%	59%	2%
Other products ⁷	306	672	3%	11.9%	119%	4%
Total	16 603	24 950	100%	6.0%	50%	100%

Source: AND-International study for the EC

⁷ Other products category covers: pasta, other products of animal origin (eggs, honey, dairy products except butter), mustard paste, hay, salt, essential oils, natural gums and resins, flower and ornamental plants, wool, cochineal, beverages made from plant extract and natural mineral waters and spring waters (before 2011).

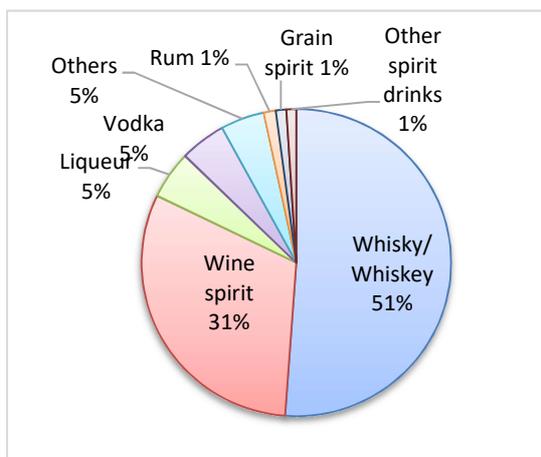
Spirit drinks: EUR 10 billion



The total sales of GI spirit drinks were estimated to EUR 10.35 billion in 2017 for a total production volume of 6 285 MHLPA⁸.

The total sales value of spirit drinks has **grown by 26% since 2010**.

Percentage of main spirit drinks types (in % of 2017 sales value)



Source: AND-I study for the EC

Aromatised wine products: EUR 43 million

The sales value of these GIs was **EUR 43 million in 2017**, which represented 0.05% of the total sales of the GI products. The main producing MS is Germany (2 out of the 5 registered names).

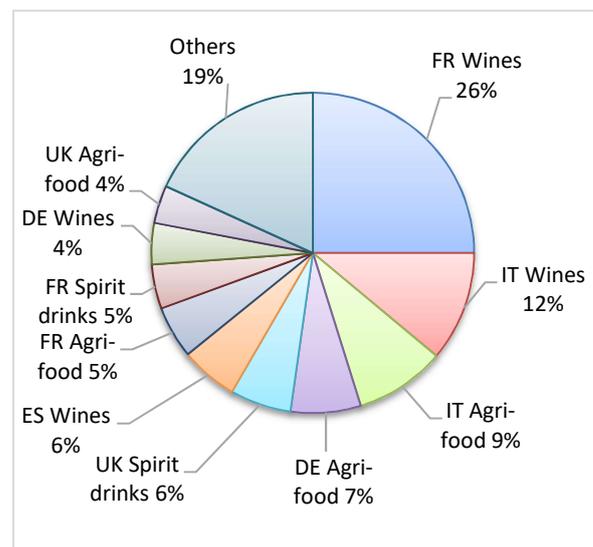
SALES VALUE BY MEMBER STATES

Five MS had sales value under GIs over EUR 5 billion each: **France, Italy, Germany, the UK and Spain**.

While an important share of the sales value concerned wines in France and Spain, agricultural products and foodstuffs in Germany and spirit drinks in the UK, it was balanced between agricultural products, foodstuffs and wines in Italy.

These 5 Member States gathered 68% of the GIs and 87% of the total sales value.

Breakdown of GIs sales value at EU28 level by sector and Member State (%)



Source: AND-I study for the EC

⁸ MHLPA: million hectoliters of pure alcohol.

WHOLE EXPORTS: EUR 32 BILLION IN 2017

Whole exports by destination and by origin

Based on data collected through the survey and COMEXT, the value of whole exports (intra-EU trade and exports to non-EU countries) of GI/TSG products was estimated to represent **EUR 32.10 billion (EUR 31.42 billion for GIs)**, which accounted for 42% of the total sales value under GI/TSG in 2017.

Wines remained the most important product in terms of extra-EU trade (EUR 8 557 million in 2017; 50% of extra-EU market for all GIs/TSGs).

While **agricultural products and foodstuffs represented 35%** of the total sales value for GI/TSG products, they amounted to **one third of intra-EU trade** (EUR 5 044 million in 2017) and 10% of extra-EU trade (EUR 1 767 million in 2017).

Spirit drinks accounted for 39% of extra-EU trade (EUR 6 706 million in 2017), whereas they represented 13% of the total sales value.

Sales value of GI/TSG products by destination, 2017 (%)



Source: AND-I study for the EC

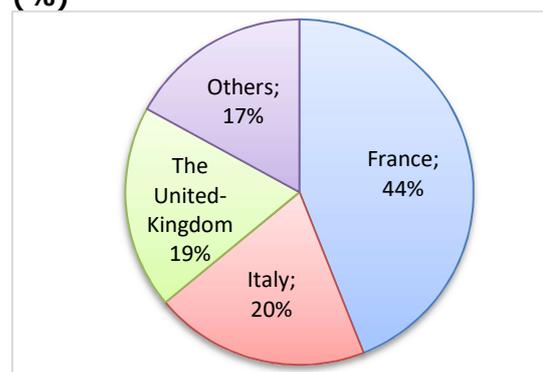
Focus on exports to non-EU countries

The total export value of GIs/TSGs to non-EU countries is estimated to **EUR 17.03 billion 2017** (mainly GIs).

It represented **15.4% of the total EU exports of food and drinks to non-EU countries**.

Exported European GI/TSG products to non-EU countries came mainly from **France (44%), Italy (20%)** and the **United-Kingdom (19%)**. In these three MSs, whole exports were pulled up by a very small number of designations.

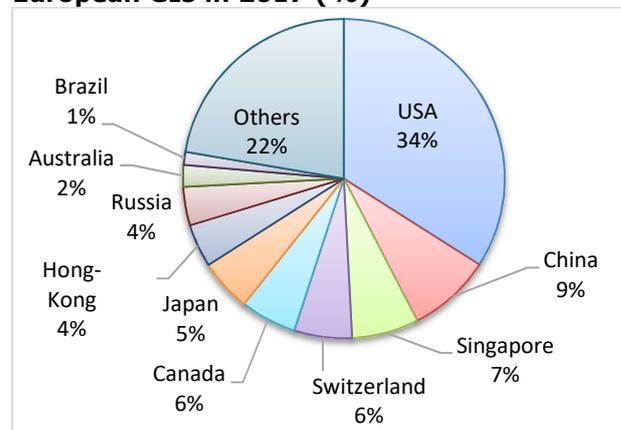
Share of EU Member States in total EU exports value to non-EU countries 2017 (%)



Source: AND-I study for the EC

USA, China and Singapore gathered half of the export value of GI/TSG products to non-EU countries.

Share of main export destinations of European GIs in 2017 (%)



Source: AND-I study for the EC

VALUE PREMIUM AT EU28 REACHED EUR 40 BILLION

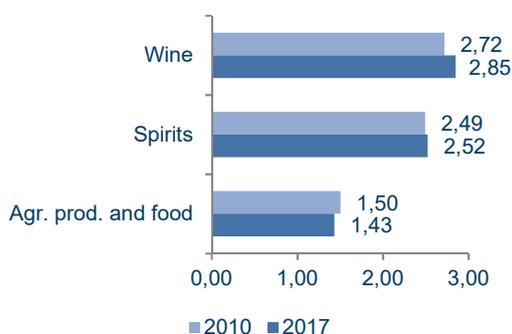
The value premium aims at analysing the difference of sales value of product names under GI/TSG to the sales value if these products were marketed at the price of comparable product without GI.

The main findings of the price and value premium analysis are:

- A **EUR 40 billion global value premium in 2017**, increase by 38% compared to 2010;
- Stability of the global value premium rate; which **moved from 2.14 in 2010 to 2.07 in 2017**;
- The importance of **France** whose share in the value premium (47%) is much higher than its share in the GI/TSG sales value (35%);
- The **importance of wines**, whose share in the premium value accounts for 65%;
- The value premium rate for **processed products** (food, wines, spirit drinks) is higher than for raw agricultural products (fruits and vegetables and fresh meats).

The figure below presents the evolution of value premium rate⁹ by EU scheme.

Value premium rate in the EU by scheme (2010 and 2017)



Source: AND International study for the EC

Method

The data presented in this report are based on: centralized data (at European or national level) completed or not by additional investigations (62% of the total number GIs/TSGs); direct survey among producers and producers' groups identified (37% of GIs/TSGs); and an appropriate survey when no producers and producers' group could be identified (1% of GIs/TSGs).

When no information was available, data have been estimated (31 % of GIs/TSGs).

The study considers the sales at wholesale stage at regional level, transport and taxes (ex-dairy stage; ex-slaughterhouse stage; ex-factory stage, ex-winery stage...).

Want to know more?

For more information about this study, including an executive summary and a full report, visit DG AGRI's website at:

https://ec.europa.eu/agriculture/external-studies_en

⁹ Value premium rate is the ratio of the price of the GI product to the price of a similar non-GI product

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