



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

Final Report

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With subcontractors



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

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TABLE OF CONTENT

INTRODUCTION	2
CHAPTER 1: METHODOLOGICAL APPROACH OF THE STUDY.....	4
A. OBJECTIVES AND SCOPE OF THE STUDY	5
A.1 Objectives	5
A.2 Scope.....	6
B. METHOD OF DATA COLLECTION.....	9
B.1 Data collection	9
B.2 Collection of centralised data with/without additional investigations	10
B.3 Direct survey	10
B.4 Appropriate survey	11
B.5 Estimates of missing data	11
B.6 Stages of the supply chain retained.....	12
C. METHOD OF ANALYSIS	13
D. GAPS AND LIMITS.....	14
CHAPTER 2: ECONOMIC ANALYSIS OF PRODUCTS UNDER GIS AND TSGS	15
E. GENERAL OVERVIEW.....	16
E.1 Sales value of products under GI/TSG	16
E.2 Whole exports	18
E.3 Importance of GIs/TSGs in the EU28 food and drink sector	20
E.4 Individual size of GIs/TSGs	22
E.5 Objectives pursued with quality schemes and economic impacts.....	23
E.6 Clustering of GIs/TSGs based on size (sales value) and price premium.....	26
F. ANALYSIS BY SECTOR	27
F.1 Agricultural products and foodstuffs	27
F.2 Wines.....	47
F.3 Spirit drinks	64
F.4 Aromatised wine products.....	69
G. ANALYSIS BY MEMBER STATE.....	70
G.1 Proposed groups of MSs with comparable features	70
G.2 France.....	72
G.3 Italy.....	74
G.4 Germany	76
G.5 United-Kingdom	78
G.6 Spain	80
G.7 Portugal	82
G.8 The Netherlands	84
G.9 Austria	86
G.10 Greece	88
G.11 Ireland.....	90
G.12 Czechia	92
G.13 Poland.....	94
G.14 Other Member States	96
H. SPECIFIC ANALYSIS FOR THE UNITED-KINGDOM.....	97
CHAPTER 3: PRICE PREMIUM AND VALUE PREMIUM FOR GI/TGS PRODUCTS	100
I. METHOD: COMPARISON WITH SIMILAR PRODUCTS WITHOUT GI/TSG	101

EUROPEAN COMMISSION

J.	VALUE PREMIUM IN THE EU28	102
J.1	Value premium by scheme	102
J.2	Value premium rates by class of agricultural products and foodstuffs	103
J.3	Value premium by Member State in the wine sector	109
J.4	Value premium by Member State in the spirit drinks sector	110
J.5	Value premium rates by combinations of MS/product	111
J.6	Value premium rates by Member State	113
	CHAPTER 4: ASSESSMENT OF THE OPTIONS FOR FUTURE UPDATES AND IMPROVEMENTS	114
K.	ASSESSMENT OF DATA COLLECTION	115
L.	PROPOSALS	115
L.1	Structuring the data collection system in every Member State	115
L.2	Developing regular updates of the GI/TSG database based on semi-aggregated data	116
L.3	Exhaustive update on behalf of the EU Commission	117
	ANNEXES	118
	ANNEX 1: PRODUCTS REGISTERED BETWEEN 01/01/2017 AND 31/12/2017	119
	ANNEX 2: PRODUCTS FOR WHICH THE AREA OF PRODUCTION COVERS SEVERAL MS (15 PRODUCTS) OR COVERS SEVERAL PRODUCTS FAMILIES (4 PRODUCTS)	120
	ANNEX 3: MAPPING	121

LIST OF TABLES

Table 1 – Number of GIs/TSGs covered by the data collection per MS and per sector.....	7
Table 2 – Share of GIs/TSGs and national sectors for each method of data collection.....	9
Table 3 – Sales value by scheme in the EU28 between 2010 and 2017 (million EUR)	16
Table 4 – Breakdown of the growth of the GI/TSG value between 2010 and 2017	17
Table 5 – Trade of GI/TSG products by scheme, 2010 and 2017 (million EUR)	18
Table 6 - Means and median of total sales value by GI in 2017 (1 000 euros)	22
Table 7: Sales value of agricultural products and foodstuffs under GI/TSG in the EU 28 (million EUR).....	27
Table 8: Sales volume of agricultural products and foodstuffs under GI/TSG in the EU 28 (million EUR).....	27
Table 9 - Sales value under GIs per category of agri-food products in EU28 (million EUR)	28
Table 10 - Sales value of cheese products and foodstuffs under GIs and TSGs in the EU28 (million EUR).....	31
Table 11 - Sales value of cheeses under GIs (excl. TSGs) by MS in the EU28 (million EUR).....	31
Table 12 - Sales value under GIs (excl. TSGs) per subcategory of cheese in EU28 (EUR M)	32
Table 13 - Sales value of meat products under GIs and TSGs in the EU28 (million EUR)	33
Table 14 – Sales value of meat products under GIs (excl. TSGs) by MS in the EU28 (million EUR)	33
Table 15 - Sales value under GIs (excl. TSGs) per subcategory of meat products in the EU28 (million EUR).....	34
Table 16 - Sales value of beers under GIs and TSGs in the EU28 (million EUR)	34
Table 17 - Sales value of beers under GIs and TSGs in by MS the EU28 (million EUR)	35
Table 18 - Sales value of fresh meat under GIs and TSGs in the EU28 (million EUR)	35
Table 19 – Sales value of fresh meat under GIs by MS in the EU28 (million EUR)	36
Table 20 - Sales value under GIs in 2017 per subcategory of fresh meat in the EU28 (million EUR)	36
Table 21 – Sales value of fruits and vegetables and cereals under GIs in the EU 28 (million EUR).	37
Table 22 – Sales value of fruits and vegetables and cereams under GIs by MS, in the EU28 (million EUR).....	37
Table 23 – Sales value under GI per subcategory of fruits and vegetables and cereals in the EU28 (million EUR).....	38
Table 24 - Sales value of fish, molluscs and crustaceans under GIs/TSGs in the EU 28 (million EUR)	38
Table 25 - Sales value under GI per subcategory of fish and molluscs in the EU28 (million EUR) ..	39
Table 26 - Sales value of oils and fat products under GIs in the EU28 (million EUR)	39
Table 27 - Sales value of oils and fat products under GIs by MS in the EU28 (million EUR)	40
Table 28 - Sales value under GIs per subcategory of oils and fat products in the EU28 (million EUR)	40
Table 29 - Sales value of other products under GIs by product designation in the EU28 (million EUR).....	41
Table 30: Sales value of other products under GIs by MS in the EU28 (million EUR)	41
Table 31: Sales value of TSG product in the EU28 (million EUR)	41
Table 32 - Sales value of agri-food products under TSGs in EU28 by category of products in the EU28 (million EUR).....	42
Table 33: Intra-EU sales of agri-food products under GIs/TSGs in EU28 (million EUR).....	43

EUROPEAN COMMISSION

Table 34: Intra-EU sales of agri-food products under GIs (TSG excl.) by category of products in the EU 28 (million EUR).....	44
Table 35: Intra-EU sales of agri-food products under GIs (TSG excl.) by MS in the EU 28 (million EUR).....	44
Table 36: Extra-EU sales of agri-food products under GIs/TSGs in the EU28 (million EUR).....	45
Table 37: Exports to non-EU countries of agri-food products under GIs (TSG excl.) in the EU 28 (million EUR).....	45
Table 38: Exports to non-EU countries of agri-food products under GIs (TSG excl.) by MS in the EU 28 (million EUR)	46
Table 39 - Evolution of the wine consumption between 2005 and 2017 at world level and in the main countries.....	48
Table 40 - Top exporters and importers of wine in 2017 at world level (volume and value).....	49
Table 41 - Sales volume and sales value for wine under PDO and PGI in the main Member States	52
Table 42 - Breakdown of sales according to destinations (% of sales value), 2017.....	66
Table 43 - Main destinations for Cognac (% of value of exports to non-EU countries).....	67
Table 44 - Main destinations for Scotch Whisky (% of value of exports to non-EU countries).....	68
Table 45 - Main destinations for Ouzo (% of value of intra-EU trade and exports to non-EU countries)	69
Table 46 - Main features regarding each MS on the economics of GIs (excluding TSGs and aromatised wines).....	71
Table 47 - Main figures for France	72
Table 48 – Main figures for Italy	74
Table 49 – Main figures for Germany	76
Table 50 – Main figures for the United-Kingdom	78
Table 51 – Main figures for Spain	80
Table 52 – Main figures for Portugal.....	82
Table 53 – Main figures for the Netherlands.....	84
Table 54 – Main figures for Austria	86
Table 55 – Main figures for Greece	88
Table 56 – Main figures for Ireland	90
Table 57 – Main figures for Czechia	92
Table 58 – Main figures in Poland	94
Table 59 : EU 27 sales to the UK, excluding TSGs, in million EUR	97
Table 60 : EU 27 sales of agri-food products to the UK, 2017, excluding TSGs, in million EUR.....	97
Table 61 : EU27 agri-food products sales to the UK, by MS, excluding TSGs, in million EUR.....	98
Table 62 : EU 27 sales of wines to the UK, in million EUR	98
Table 63 : French wines sales to the UK, in million EUR.....	99
Table 64 : EU 27 sales of spirits to the UK, in million EUR.....	99
Table 65 - Value premium rate of product classes of minor importance in the EU28 sales value, 2010 and 2017	104
Table 66 - Value premium rates in the fresh meat sector.....	106
Table 67 - Share of the GIs' sales value in the main sectors/Member States	108
Table 68- Share of GI' sales value in the wine scheme	109
Table 69 - Share of GI' value in the spirit drinks scheme, 2017 (%)	111

Table 70 – TOP 15 combinations for MS/type of product (sales value, value premium, value premium rate)..... 112

LIST OF FIGURES

Figure 1 - Share of GIs/TSGs per data collection method (%)	10
Figure 2 – Mapping of the EU28 according to the national GIs sales value in 2017 (excluding TSGs)	17
Figure 3 – Sales value of GIs by Member State/sector (TSGs excluded), 2017	18
Figure 4 – Sales value of GI/TSG products by destination, 2017 (%)	19
Figure 5 – Whole exports sales by scheme, 2017 (%)	19
Figure 6 – Export profile of the Member States (sales of each market as a percentage of whole exports).....	20
Figure 7 – Share of the GIs/TSGs value in the food and drink sectors in 2017	21
Figure 8 - Share of total sales value and of the number of GIs by size, 2017 (%)	22
Figure 9 : Evolution of GIs agri-food products sales value by date of registration since 2005 in EU28 (million EUR).....	29
Figure 10 : Sales value and number of GIs registered by MS, 2017 (%)	30
Figure 11 - Evolution of sales destination for agri-food products covered by GIs/TSGs from 2005 to 2017 in the EU28 (million EUR).....	43
Figure 12 - Main wine producers at world level (evolution between 2005-2007, 2009-2010 and 2015-2017, three years average).....	48
Figure 13 - Evolution of wine trade at world level between 2005 and 2017	49
Figure 14 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI at EU28 level (base 100 = 2005)	50
Figure 15 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI at EU28 level (base 100 = 2005)	50
Figure 16 - Share of sales volume and value by market for wine under PDO/PGI at EU28 level in 2017	51
Figure 17 - Share of sales volume and value for PDOs and PGIs in the wine sector at EU28 level in 2017	51
Figure 18 - Share of volume of wine used for PDO, PGI and non-GI by MS (average 2015-2017) .	52
Figure 19 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDOPGI in France (base 100 = 2005)	53
Figure 20 - Share of sales volume and value for PDOs and PGIs in the wine sector in France, 2017	54
Figure 21 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO and PGI in France (base 100 = 2005).....	54
Figure 22 - Share of sales volume and value by market for wine under PDO/PGI in France, 2017 .	55
Figure 23 – Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI in France (base 100 = 2005)	55
Figure 24 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI in Italy (base 100 = 2005).....	55
Figure 25 - Share of sales volume and value for PDOs and PGIs in the wine sector in Italy, 2017 .	56
Figure 26 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO and PGI in Italy (base 100 = 2005)	56
Figure 27 -Share of sales volume and value by market for wine under PDO/PGI in Italy, 2017	57
Figure 28 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI in Italy (base 100 = 2005)	57
Figure 29 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI in Spain (base 100 = 2005)	58

Figure 30 - Share of sales volume and value for PDOs and PGIs in the wine sector in Spain, 2017	59
Figure 31 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO / PGI in Spain (base 100 = 2005)	59
Figure 32 - Share of sales volume and value by market for wine under PDO/PGI in Spain, 2017	59
Figure 33 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO / PGI in ES (base 100 = 2005)	60
Figure 34 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO / PGI in Germany (base 100 = 2005)	60
Figure 35 - Share of sales volume and value for PDOs and PGIs in the wine sector in Germany, 2017	60
Figure 36 - Share of sales volume and value by market for wine under PDO/PGI in Germany, 2017	61
Figure 37 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO / PGI in Germany (base 100 = 2005)	61
Figure 38 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO / PGI in Portugal (base 100 = 2005)	62
Figure 39 - Share of sales volume and value for PDOs and PGIs in the wine sector in Portugal, 2017	62
Figure 40 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO and PGI in Portugal (base 100 = 2005)	62
Figure 41 - Share of sales volume and value by market for wine under PDO/PGI in Portugal, 2017	63
Figure 42 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI in Portugal (base 100 = 2005)	63
Figure 43 - Sales of main spirit drinks types (% of sales value), 2017	65
Figure 44 - Breakdown of GIs spirit drinks sales according to destinations (% of sales value), 2017	66
Figure 45 - Value premium rate in the EU28 by scheme (2010 and 2017)	102
Figure 46 - Share of the value premium by scheme, 2010 and 2017 (%)	103
Figure 47- Value premium rate for agricultural products and foodstuffs, 2010 and 2017	103
Figure 48 - Value premium per category in the agricultural products and foodstuffs scheme (% of EU28 value premium)	107
Figure 49 - Value premium rate of GI products per category and Member State	108
Figure 50 - Value premium rate in the main Member States in the wines scheme	109
Figure 51- Value premium rate per Member State in the spirit scheme	110
Figure 52 - Share of the total value premium and sales in the main Member States	113
Figure 53 - Total value of GIs/TSGs in 2017	121
Figure 54 - GI sales value of wines in 2017	121
Figure 55 - GI/TSG sales value of agricultural products and foodstuffs in 2017	122
Figure 56 - GI sales value of agricultural products and foodstuffs in 2017	122
Figure 57 - GI sales value of spirit drinks in 2017	123
Figure 58 - Value of exports of GIs to non-EU countries in 2017 (all sectors)	123
Figure 59 - Value of exports of GI wines to non-EU countries in 2017	124
Figure 60 - Value of exports of GI agricultural products and foodstuffs to non-EU countries in 2017	124
Figure 61 - Value of exports of GI spirit drinks to non-EU countries in 2017	125

Figure 62 – Mapping of the number of registered GI/TSG products per Member State in 2017 ...	125
Figure 63 - Mapping of the number of registered GI products per Member State in 2017	126
Figure 64 – Mapping of the number of registered agricultural products and foodstuffs GIs/TSGs per Member State in 2017	126
Figure 65 - Mapping of the number of registered agricultural products and foodstuffs GIs per Member State in 2017	127
Figure 66 - Mapping of the number of registered GI wines per Member State in 2017	127
Figure 67 – Mapping of the number of registered GI spirit drinks per Member State in 2017	128

GLOSSARY

AAGR	Average Annual Growth Rate
ACP	The African, Caribbean and Pacific
ANICE	Asociación Nacional de Industrias de la Carne de España (ES)
AR	Argentina
AT	Austria
AU	Australia
BE	Belgium
BG	Bulgaria
BRC	British Retail Consortium (UK)
CECRV	Conferencia Española de Consejos Reguladores Vitivinícolas (ES)
CMO	Common Market Organization
CL	Chile
CN	China
CNIV	Comité National des Interprofessions des Vins (FR)
CY	Cyprus
CZ	Czechia
DE	Germany
DEFRA	Department For Environment, Food and Rural Affairs (UK)
DGDDI	Direction Générale des Douanes et des droits Indirects (French Customs FR)
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
ETL	Food and Drink Industries' Federation (FI)
EU	European Union
EUR	Euro
FAO	Food and Agriculture Organization
FEBE	Federación Española de Bebidas Espirituosa (ES)
FEV	Federación española del Vino (ES)
FEVS	Fédération des Exportateurs de Vins et de Spiritueux (FR)
FI	Finland
FIVS	Fédération internationale du vin et des spiritueux (FR)
FR	France
GI	Geographical Indication
HL	Hectolitre
HR	Croatia
HU	Hungary
IE	Ireland
IFS	International Featured Standard
INAO	Institut national des appellations d'origine (FR)
INRA	Institut national de la Recherche Agricole (FR)
ISMEA	Istituto di Servizi per il Mercato Agricolo Alimentare (IT)
ISTAT	Istituto nazionale di statistica (IT)

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IT	Italy
IVV	Instituto da Vinha e do Vinho (PT)
JP	Japan
LT	Lithuania
LU	Luxembourg
LV	Latvia
M	Million
MAPAMA	Ministerio de Agricultura, Pesca y Alimentacion (ES)
MS	Member State
MT	Malta
NL	Netherlands
OIV	International Organization of Vine and Wine
ONIV	Organizatia Nationala Interprofesionala Vitivinicola (RO)
PDO	Protected Denomination of Origin
PGI	Protected Geographical Indication
PL	Poland
PT	Portugal
RO	Romania
RU	Russian Federation
SBS	Structural Business Statistics
SE	Sweden
SI	Slovenia
SK	Slovakia
SS	Statistical Secret
SSPO	Scottish Salmon Producer Association
t	Ton
TSG	Traditional speciality guaranteed
UK	United Kingdom
US	United States
ZA	South Africa

ABSTRACT

This study collected and analysed economic data on Geographical Indications (GIs) and Traditional Specialties Guaranteed (TSGs) registered in the 28 Member States of the European Union, over the 2011-2017 period (3 153 GIs and 54 TSGs). The estimate of sales value of GIs/TSGs was EUR 77.1 billion in 2017 (EUR 74.8 billion excluding TSGs), wines accounting for 51% of this value (EUR 39 billion), agricultural products and foodstuffs for 35% (EUR 27 billion), spirit drinks for 13% (EUR 10 billion), and aromatised wine products for 0.1% (EUR 43 million). The total sales value covered by GIs/TSGs has grown by 42% since 2010 (37% excluding TSGs). Five Member States had a sales value of GI products over EUR 5 billion each: France, Italy, Germany, the UK and Spain. 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, which accounted for 42% of the total sales value in 2017 (20% for intra-EU trade and 22% for exports to non-EU countries). Finally, the global value premium reached EUR 40 billion in 2017 and increased by 38% compared to 2010. The value premium rate moved from 2.14 in 2010 to 2.07 in 2017.

Cette étude vise à collecter et analyser les données économiques relatives aux produits protégés par une indication géographique (IG) ou une spécialité traditionnelle garantie (STG) sur la période 2011-2017 (3 153 IG et 54 STG). L'estimation de la valeur des ventes de produits IG/STG est de 77,1 milliards EUR en 2017 (74,8 milliards EUR sans les STG), les vins représentant 51% de la valeur (39 milliards EUR), les produits agricoles et alimentaires 35% (27 milliards EUR), les boissons spiritueuses 13% (10 milliards EUR), et les vins aromatisés 0,1% (43 millions EUR). La valeur totale des ventes de produits IG/STG a augmenté de 42% depuis 2010 (37% hors STG). La valeur totale des ventes de produits IG était supérieure à 5 milliards EUR dans cinq Etats membres : France, Italie, Allemagne, Royaume-Uni et Espagne. La valeur des exportations totales des produits IG/STG est estimée à 32,10 milliards EUR, soit 42% de la valeur totale des ventes des produits IG/STG en 2017 (20% pour le commerce intra-UE et 22% pour les exports vers pays tiers). Enfin, le différentiel de valeur a atteint 40 milliards EUR en 2017, soit une augmentation de 38% par rapport à 2010. Le différentiel de valeur est passé de 2,14 à 2,07 entre 2010 et 2017.

INTRODUCTION

The study aims to collect economic data on each of the 3 207 products registered under the geographical indication (GI)/Traditional Specialities Guaranteed (TSG) schemes in the EU over the 2011-2017 period. It covers four schemes: agricultural products and foodstuffs (Reg. (EU) No 1151/2012), wines (Reg. (EU) No 1308/2013), spirit drinks (Reg. (EC) No 110/2008), and aromatised wine products (Reg. (EU) No 251/2014)¹. The data for each GI/TSG have been entered into a database and aggregated at sectoral and geographical levels.

The data presented in this report are based on European and national statistics, a direct survey of producer groups and producers, and interviews with experts. Furthermore, when no data were available, estimates were made based on the information available.

The sales value of the European food and drink sector was estimated at EUR 1 101 billion in 2017². The share of GI/TSG products reached 7.0% in EU28, corresponding to an estimated sales value of EUR 77.15 billion in EU28 in 2017. There was a 42% increase between 2010 and 2017. Wines accounted for 51% of total sales (EUR 39.42 billion), agricultural products and foodstuffs for 35% (EUR 27.34 billion), spirit drinks for 13% (EUR 10.35 billion) and aromatised wines for 0.1% (EUR 43.4 million).

Excluding TSGs, the total sales value of GIs was estimated at 74.8 billion in 2017 representing an increase of 37% between 2010 and 2017.

Excluding the United Kingdom (UK), the total sales value of GI/TSG products was estimated at EUR 69.4 billion in 2017. The UK value was mainly due to spirit drinks with a share of 46% in the GI spirit drinks value of EU28; UK agricultural products and foodstuffs accounted for 10.8% of the GI/TSG agricultural products and foodstuffs in the EU28 and UK wines accounted for 0.02% of the GI wines in the EU28.

The global growth of EUR 22.6 billion between 2010 and 2017 was mainly due to the new products registered between 2010 and 2016 (21% of the growth), to the inclusion of the TSGs in the scope of the study (11%), and to the growth of the two main sectors in terms of sales value under GI (in particular due to an increase of price) : GI wines in France (17% of the growth) and GI wines in Italy (13% of the growth).

The leading Member State (MS) was France, notably due to wines (EUR 26.9 billion including 72% for wines, 15% for agricultural products and foodstuffs and 13% for spirit drinks). The second was Italy with a different balance between the GIs registered in the different schemes (EUR 15.8 billion, including 55% for wines, 44% for agricultural products and foodstuffs and 1% for spirit drinks).

The next two MSs were Germany (EUR 8.7 billion including 61% for agricultural products and foodstuffs, 37% for wines and 2% for spirit drinks) and the UK (EUR 7.7 billion including 62% for spirit drinks and 38% for agricultural products and foodstuffs). The GI/TSG sector in these MSs were characterised by more GIs than the European average accounting for 7% of the number of total GIs and for 21% of the total sales value.

The next MSs in terms of sales value were Spain, Portugal, the Netherlands, Austria, Greece, Ireland, Czechia and Poland: in each of these MSs, the sales value was between EUR 0.8 billion and EUR 7.2 billion. The total sales value in 2017 in each of

¹ Data on these four schemes were collected for the period 2005-2010 in two previous DG AGRI studies "Value of agricultural production under protected designations of origin (PDO) and protected geographical indications (PGI)" in 2009 and 2012.

² Source: EU Food&Drink Industry

the other 16 MSs was lower than EUR 0.5 billion each in 2017; this last group of MSs accounted for 1.8% of the total sales value.

The value of whole exports of GI/TSG products accounted for EUR 32.10 billion, which represented 42% of the total sales value in 2017. Excluding TSGs, whole exports accounted for 31.42 billion (42% of the sales). Exports to non-EU countries accounted for 22% of the total sales and intra-EU sales reached 20% of the total sales in 2017. Wines remained the most important product both in terms of total sales value (51%) and extra-EU trade (50%). Agricultural products and foodstuffs represented 35% of the total sales value for GI/TSG products, and 10% of extra-EU trade. Spirit drinks accounted for 39% of extra-EU trade, whereas they represented 13% of the total sales value.

Furthermore, the study includes an analysis of the price and value premium of products bearing a GI/TSG compared to non-GI/TSG products. A value premium has been calculated to consider the weight of each sector in the total EU28 GI/TSG sales. Main findings are:

- the global stability in the value premium rate - the global value premium rate was 2.14 in 2010, dropping slightly to 2.07 in 2017;
- the importance of France, whose contribution to the value premium was much more important than its contribution to the GI sales value;
- the importance of wines, whose share in the value premium was 65 %;
- the higher value premium rate for processed products (food, wines, spirit drinks) than raw agricultural products (fruits and vegetables and fresh meats).

In this document, we present:

- the general approach of the survey,
- the results: sales value of GI at EU28 level, by regulation and by MS,
- the analyses based on price and value premium,
- an assessment of the options for future updates and improvements.

CHAPTER 1: METHODOLOGICAL APPROACH OF THE STUDY

A. OBJECTIVES AND SCOPE OF THE STUDY

A.1 Objectives

The objectives of the study are listed below.

1. **Update and expand the existing database.** In the context of two previous surveys led by AND International for the Directorate-General for Agriculture and Rural Development of the European Commission (DG AGRI) (in 2009 and 2012 ⁽³⁾), a database was created using Microsoft Access. It contains data on sales volume and sales value for all GIs registered in the EU from 2005 to 2010, including:
 - total sales,
 - sales in the MS of production,
 - sales in other MSs,
 - sales in non-EU countries.

The objective of this study is to update the database with data from 2011 to 2017 (and from 2013 onward for Croatia, which entered the EU in that year) for all GIs and TSGs registered up to 31 December 2017. The TSG data set is separate from the GI data set.

The objective is to deliver aggregates for publication on the DG AGRI web pages. Data extracts, aggregated data and records delivered in the context of the study allow for UK data to be separated from data for the other MSs (offering the possibility of extracting data for the EU27 without the UK and for the EU28 with the UK).

Estimates are provided in cases where it has not been possible to obtain data.

2. **Economic analysis.** Based on the information collected, which are harmonised and aggregated, the study aims to:
 - analyse the price premium received by GI and TSG products compared to comparable products without a quality scheme,
 - analyse the evolution of GIs and TSGs (in terms of sales volume, sales value, price trade) and compare their evolution with comparable products without GIs and TSGs.

Country records for selected non-EU countries. The study also aims at establishing records to describe exports to non-EU countries (excluding exports of GIs from the UK). The countries to be covered are: Canada, the United States (US), Mexico, Argentina, Brazil, Chile, Colombia, Costa Rica, Ecuador, Paraguay, Peru, Uruguay, Kenya, Morocco, Nigeria, South Africa, China (including Hong Kong), India, Japan, Singapore, South Korea, Taiwan, Vietnam, Australia, New Zealand, Russia, Ukraine, Turkey, Norway, Switzerland, and the African, Caribbean and Pacific (ACP) countries as a group.

³ Link to the 2012 study: https://ec.europa.eu/agriculture/external-studies/value-gi_en

A.2 Scope

The data collection covers 3 207 products in the 28 MSs of the EU. It represents all GIs and TSGs registered until 1 January 2017 in the framework of the following EU regulations:

- Regulation (EU) No 1151/2012: Agricultural products and foodstuffs (PDO, PGI and TSGs) – 1 367 products (43% of all GIs/TSGs).
- Regulation (EU) No 1308/2013: Wines (PDOs/PGIs) – 1 576 products (49% of all GIs/TSGs).
- Regulation (EC) No 110/2008: Spirit drinks (GIs) – 235 products (8% of all GIs/TSGs).
- Regulation (EU) No 251/2014: Aromatised wine products (GIs) – 5 products (0.2% of all GIs/TSGs).

Bearing in mind the importance of consistency with the previous study:

- In the methodology validated during the previous studies and proposed here, data are included in aggregates only the year after registration (year N+1). The rationale was that a *prorata temporis* may not be appropriate for all types of GIs as the seasonality of the production/consumption should be taken into account (in particular for wine with harvest in September, fruits and vegetables with specific date of harvest, seafood products consumed at Christmas period, seasonality of dairy production...). Consequently, the starting period for data collection is the year following product registration. For instance, for a product registered in 2015, the data included in the aggregates will cover the years 2016 and 2017. It means that the 43 products registered between 01/01/2017 and 31/12/2017 and presented in Annex 1 are not in the scope of the aggregates.
- The 3 207 products in our list include 19 products for which the area of production covers several MSs (15 products) or several product families (4 products). A product that covers two MSs (for instance, "Irish Whisky"⁴ that covers Ireland and Northern Ireland (the UK)) or two product families (for instance, apples and pears for the PGI "Pommes et Poires de Savoie"⁵ in France) will be counted twice in our database⁶. In total, 44 "single" product entries on the database are "duplicates" for products covered by more than one MS or more than one product family. See the detail of this list in Annex 2.

The following table 1 shows the number of GIs/TSGs for each sector in each MS. Almost 80% of the GIs/TSGs are registered in six MSs: Italy, France, Spain, Greece, Portugal and Germany.

⁴ Where « Irish Whisky » is mentioned, the name refers to "Irish Whiskey/Uisce Beatha Eireannach/Irish Whisky"

⁵ Where "Pommes et Poires de Savoie" is mentioned, the name refers to « Pommes et Poires de Savoie/Pommes de Savoie/Poires de Savoie »

⁶ One GI for "Irish Whisky" in Ireland, one GI for "Irish Whisky" in Northern Ireland, which is part of the UK, one GI for apple "Pommes et poires de Savoie" and one GI for pear "Pommes et poires de Savoie".

Table 1 – Number of GIs/TSGs covered by the data collection per MS and per sector (ordered by % per MS)

MS	Agricultural products and foodstuffs		Wines	Spirits	Aromatised wines	Total	% per MS	% Cumulative ⁷
	PDO/PGI	TSG						
IT	289	2	521	37	1	850	27%	27%
FR	239	1	432	52	1	725	23%	49%
ES	192	4	131	19		346	11%	60%
EL	104	0	147	16		267	8%	68%
PT	136	1	40	11		188	6%	74%
DE	89	0	39	34	2	164	5%	79%
UK	60	3	4	4		71	2%	81%
BG	2	4	54	9		69	2%	84%
RO	3	0	50	9		62	2%	86%
HU	13	1	35	7		56	2%	87%
AT	16	1	29	9		55	2%	89%
SI	20	3	17	7		47	1%	90%
CZ	29	0	13	1		43	1%	92%
PL	29	9		3		41	1%	93%
HR	15	0	16	6	1	38	1%	94%
BE	13	5	9	10		37	1%	95%
NL	11	3	12	5		31	1%	96%
SK	11	7	8	1		27	1%	97%
CY	5	0	11	2		18	1%	98%
LT	7	0		8		15	0%	98%
FI	7	3		2		12	0%	99%
SE	6	2		3		11	0%	99%
DK	6	0	4			10	0%	99%
IE	5	2		3		10	0%	100%
LV	2	3				5	0%	100%
LU	4	0	1			5	0%	100%
MT	0	0	3			3	0%	100%
EE	0	0		1		1	0%	100%
Sub-total	1 313	54	1 576	259	5	3 207	100%	/
Total	1 367		1 576	259	5	3 207	100%	/
%	43%		49%	8%	0%	100%	/	/

⁷ Each cell of this column is the sum of the cells of the column “% per MS” from the first to the current line of the table

Compared to the previous study (conducted in 2012), the list of designations of the present study reflects the following changes:

- The addition of new products in the scope of the present study:
 - The introduction of the 54 TSG products;
 - The arrival of Croatia as a new MS in the EU in 2013 (38 products registered as GIs/TSGs);
 - 520 new products registered between 1 January 2010 and 31 December 2016, including 57% PGIs, 35% PDOs, 6% TSGs and 2% GIs. Of these new registered products, 95% are agricultural products and foodstuffs and 54% are concentrated in Italy, France, Spain and Germany.
- The removal from the register of some products for various reasons:
 - Eighty-seven spirit drinks were no longer registered as GIs in 2016 due to the update of the Annex III of EU Regulation (EC) No 110/2008 on GIs in the spirit drinks sectors⁸. In 2012, when the previous study was conducted, GIs in the spirit sector had a specific status. At this time, a producers' group was not necessarily established for each GI. However, for each GI registered in Annex III of Regulation (EU) No 110/2008, a technical file had to be submitted to the Commission by 20 February 2015 (Article 20 of the Regulation) containing, among other information, "the name and contact address of the applicant" (Article 17 of the Regulation). GIs for which no technical file was transmitted have been removed. The main consequence of this situation has been the decrease in the number of spirit drinks registered under GIs. For these spirit drinks, considering that this Regulation entered into force in 2016, sales data only up to 2015 is entered in the database. Indeed, from 2016, these spirit drinks are no longer part of the EU GIs register. The sales value of these 87 spirit drinks was estimated at EUR 107 million in 2010.
 - Twenty-seven other products are no longer registered:
 - 24 mineral waters from Germany;
 - 3 German beers ("Wernesgrüner Bier" cancelled in 2013 and "Gögginger Bier" and "Rieser Weizenbier" cancelled in 2011). The sale value of these 3 beers was estimated at EUR 57 million in 2010.

⁸ Update of Annex III of Regulation (EC) No 110/2008 of the European Parliament and of the Council on the definition, description, presentation, labelling and the protection of geographical indications of spirit drinks: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016R1067>

B. METHOD OF DATA COLLECTION

B.1 Data collection

An important amount of information already exists on GIs/TSGs from national and regional public authorities and professional organisations. Consequently, the first step in the data collection phase was to gather this information owned by public and professional organisations.

However, except in few cases, this centralised data was not sufficient to complete the database with all information requested. That is why we have implemented complementary data collection among producers or producers' groups, when they could be identified, as well as experts.

To be meaningful, the economic aggregates from the database must be based on exhaustive information for each GI/TSG. That is why when no data was available, estimates were made by the study team using the information that was available (sectoral statistics, experts, etc.).

Thus, the data presented in this report are based on:

1. Centralised data (at European or national level);
2. Centralised data and additional investigations;
3. Direct survey completed by identified producers and producers' groups;
4. Appropriate survey when no producers or producers' groups could be identified.;

Following these four methods of data collection, the remaining missing data have been estimated.

Table 2 – Share of GIs/TSGs and national sectors for each method of data collection

	% of total number of GIs/TSGs
Centralised data	32%
Centralised data and additional investigations	30%
Appropriate survey	1%
Direct survey	37%
Total	100%

The direct and appropriate surveys target 1 240 GI/TSG products (38 % of GIs/TSGs), mainly in Greece, Germany, France, Bulgaria and Romania. The direct survey covers 1 201 designations, for which an electronic survey was sent via email to about 1 700 contacts.

Centralised data covered 32 % of GIs/TSGs, mainly for agricultural products and foodstuffs in France, Italy, Spain and Portugal.

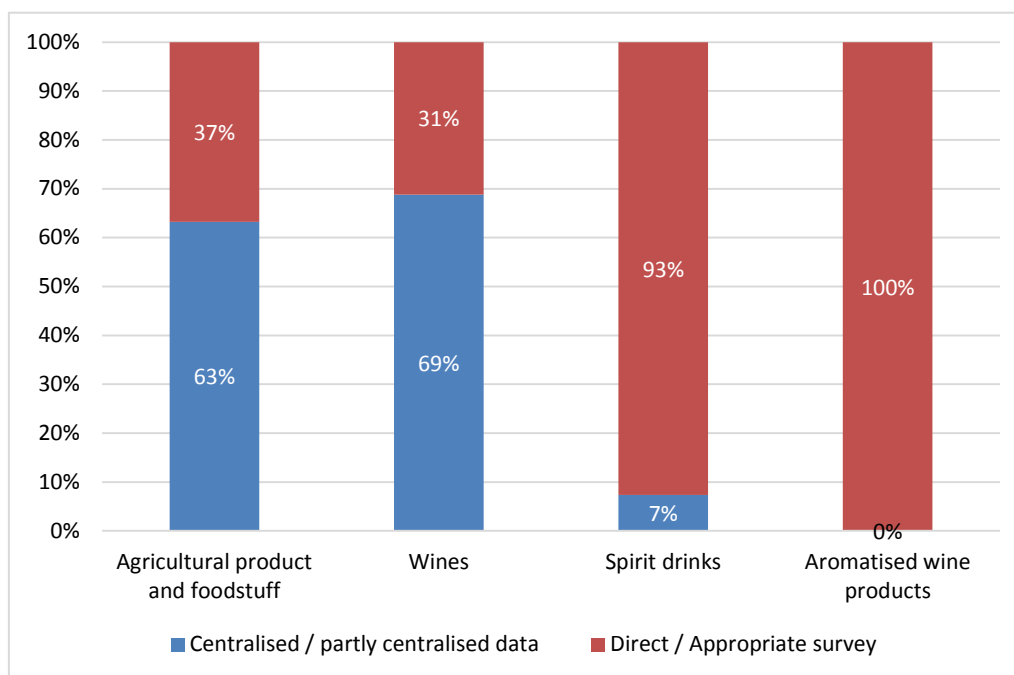
Aggregated data were available in the wine scheme (DG AGRI statistics), which has the largest number of GIs/TSGs with no centralised data (49 %). Greek wines account for 30 % of the total number of GIs for which no data were available.

Agricultural products and foodstuffs account for 40 % of the GIs/TSGs for which no individual data were available; Germany and Greece account for 38 %.

Spirit drinks account for 19 % of GIs/TSGs for which no individual data were available (37 % of these GIs are registered in France and Italy). However, this has a limited impact on the total sales value under GIs, as we estimate that a large share of the

sales is concentrated among a limited number of GIs for which data were available, notably Scotch Whisky and Cognac⁹.

Figure 1 - Share of GIs/TSGs per data collection method (%)



Centralised and partly centralised data covered 61% of GIs/TSGs. No individual data have been collected for 39% of GIs/TSGs and thus estimates were calculated. The estimated data accounted for 44% of total sales value.

B.2 Collection of centralised data with/without additional investigations

For some MSs and sectors, all the information requested in the context of this study was available from public or professional bodies at centralised level. This covers data for volumes, values and whole exports (intra-EU trade and exports to non-EU countries) of GI/TSG products on an annual basis. In these cases, no additional data collection was conducted. This concerns Spain (all sectors), Italy (agri-food products), France (agri-food products) and Portugal (agri-food products).

In other cases, public and professional bodies had only some of the data needed. The remaining data were collected through interviews or estimated based on other data sources. This situation concerns wines in Italy and France (French regional inter-branch organisations provided detailed data on French wines).

Furthermore, European statistics on trade (Eurostat, Comext) have been widely used, notably in the wine sector with the identification of PDOs/PGIs.

B.3 Direct survey

A direct survey was conducted when there was no centralised data but groups of producers or producers themselves could be identified. The data collection was conducted through an electronic survey targeting identified contacts.

The direct survey covered 1 201 designations, and the electronic survey was sent to about 1 700 contacts.

⁹ Where « Cognac » is mentioned, it refers to « Eau-de-vie de Cognac/Eau-de-vie des Charentes/Cognac ».

B.4 Appropriate survey

When no data were available at centralised level and when no producer or producers' groups could be identified, we carried out an indirect survey of a sample of producers of the GIs/TSGs or of professional organisations or experts.

This was the case for wines in Germany. There were no centralised data for each PDO and PGI in the wine sector. A specific collection method was implemented among the Länder' Landwirtschaft Ministerium or Agriculture Chambers or Regional Institutes where PDO/PGI wines are produced.

B.5 Estimates of missing data

Estimates played an important role in completion of the database. Here we outline two different types of estimate:

- Partial estimate: in many cases, even if some data were made available by national or regional organisations or producers' groups, some data were still missing. For instance, in some cases the share of sales in and out of the EU28 was unknown and only data on total sales out of the country of origin were available. In this case, we estimated the level of sales in each of these markets. In other cases, the sales volume was only known for one or a few years, so the other data were estimated on the base of the evolution of the sector, if available, and the price of similar products.
- Total estimate: in some cases, the data collection strategy implemented did not allow for any accurate information to be gathered. Here we estimated all the data based on the information available.

Estimates are always indicated in the database, and these were based on several sources:

- European statistics:
 - Eurostat: production data sets;
 - International trade data (largely used in the wine and spirit sector);
 - DG AGRI data on wine sector;
 - PRODCOM: data sets on products commercialization;
- Data from the previous survey for the agricultural products and foodstuffs sector;
- Information for similar products from the survey;
- Price data at the retail stage;
- Price data at the agricultural stage;
- Bulk prices for wine;
- Qualitative information from experts.

B.6 Stages of the supply chain retained

The study takes into account the sales at wholesale stage at regional level, excluding transport and taxes, for instance:

- for cheese: ex-dairy stage;
- for meat: ex-slaughterhouse or ex-cutting plant stage;
- for fruits and vegetables: ex-co-operative stage or ex-regional wholesaler stage;
- for processed products: ex-factory stage;
- for wines or spirit drinks: ex-winery/distillery stage or ex-regional wholesale stage.

In the wine and spirit drinks sectors, the value is estimated on the basis of:

- a bottle price for the national market (estimated ex-area of production stage) - in most cases this refers to regional wholesalers handling the bottling of the wine;
- a price taking into account bulk and bottle sales in EU28 markets and extra-EU markets, based on trade statistics (Comext).

C. METHOD OF ANALYSIS

Analyses describe the evolution of sales volume, sales value, price and price premium of GIs and TSGs between 2010 and 2017, which can be extended back to 2005 if relevant. Analyses also compare the evolution of the GIs/TSGs with the whole sector in each MS. Both qualitative and quantitative information is used. The comprehensive data on each GI/TSG in each MS also allowed for identification of groups of MSs and GIs/TSGs based on common features.

The analysis is based on the following.

- **Aggregation of data on GIs and TSGs.** This was carried out at sectoral or geographical levels.
- **Reports on the socioeconomic aspects of GIs and TSGs.**
- **Statistics for each sector.** These were gathered in order to assess the economic importance in terms of share in the national sector for each GI/TSG and for total GIs/TSGs in the same sector. The analysis considers the importance of GIs/TSGs (or a group of GIs/TSGs) at national level.
- **Analysis of the price and value premium.** The price differences between GI and TSG products and comparable products with no quality scheme were calculated. Value premiums were also calculated by combining price and volume information for different aggregates (comparison of the sales value of GI/TSG products with the sales value of these products if they were sold at the price of standard product). This method allows integration of the sales volume of GIs/TSGs: GIs/TSGs with high economic importance (in terms of sales volume) will have more impact in the value premium than GIs/TSGs with low economic importance. This analysis is presented in Chapter 3.
- **Qualitative interviews.** These were conducted with sectoral key experts for the main sectors. These interviews focused on market trends for PDOs/PGIs/TSGs and comparison with the whole food and drink industry.

D. GAPS AND LIMITS

The main gaps and limits identified in the context of this study are as follows:

- **Estimates.** Data were provided for 56% of the total sales value of products under GI/TSG. Estimates were based on known volumes for 24% of the total sales value and estimates based on both unknown volume and value cover 20% of the total sales value of products under GIs/TSGs.

The number of estimates is due to the absence of economic monitoring of GIs/TSGs in several MSs and to the relatively low rate of response from the direct survey (18 %). This low response rate is explained by poor organisation of some supply chains under GIs/TSGs (no collective organisation for each GI/TSG), lack of data at producers' group level (where they exist), difficulty of collecting email addresses for the relevant people, business secrecy and reluctance to provide economic data despite assurance in the recommendation letter from the DG AGRI that all individual data will be kept confidential.

- **Estimates for TSGs.** These only refer to the production in the registering MS; but these products may have some production in other countries. Investigations with public authorities in Spain and France indicated that there was no relevant monitoring of the use of TSGs in MSs other than the one where they were registered.
- **Data collection in Italy.** In Italy, the Istituto di Servizi per il Mercato Agricolo Alimentare (ISMEA) is carrying out a quality check of food product data. This has been completed for 2015–2017, but data for 2011–2014 are still being verified. For these four years, data were collected, for the main products, from annual public reports. As these main products represent 80% of the sales value of Italian GI/TSG products; estimates were done for the remaining 20%.
- **Standard prices.** In some cases, it was more logical to revise the 2012 references in order to ensure consistency between the two periods. For wine, it was decided, after discussion with the steering committee, to keep the same method used in the previous study: one unique standard price per MS. Experience also shows that some reference prices from the PRODCOM database include, in the average calculation, a share of GI products. In some cases, and for a few rare products (essential oils), it is difficult to find precise references.

CHAPTER 2: ECONOMIC ANALYSIS OF PRODUCTS UNDER GIS AND TSGs

E. GENERAL OVERVIEW

E.1 Sales value of products under GI/TSG

The sales value of the European food and drink sector was estimated at EUR 1 101 billion in 2017¹⁰. The share of GI/TSG products reached 7.0% in EU28, corresponding to an estimated sales value of EUR 77.15 billion in EU28 in 2017.

Excluding TSGs, the total sales value of GIs was estimated at 74.8 billion in 2017. More than half (51.1 %) of this value was accounted for wines; 35.4 % was covered by agricultural products and foodstuffs; spirit drinks represented 13.4 %; and aromatised wine products made up 0.1 %.

Table 3 – Sales value by scheme in the EU between 2010 and 2017 (million EUR)

	2010	2011	2012	2013	2014	2015	2016	2017
Wines	29 630	32 099	33 934	34 976	35 741	37 586	37 889	39 418
Agricultural products and foodstuffs	16 603	19 672	21 433	21 922	23 068	23 714	26 074	27 339
Spirit drinks	8 249	9 140	9 458	9 500	9 063	9 456	9 493	10 347
Aromatised wine products	31	36	35	32	37	39	39	43
Total GIs (excluding TSGs)	54 513	59 357	62 852	64 215	66 151	69 483	71 592	74 759
Total (GIs + TSGs)	54 513	60 946	64 861	66 431	67 909	70 794	73 495	77 148

Source: AND International study for DG AGRI

The global trend was an increase of the sales from 2010 to 2017 with a global increase of 42 % for all GIs/TSGs which represented an amount of EUR 22.6 billion. Excluding TSGs, the global increase of the value is estimated at 37%, which represented an amount of EUR 20.2 billion. It must be noted that this growth, with a value estimated at EUR 2.5 billion in 2017, is partly due to the changes in the scope of the study (the entrance of Croatia during the period plus the addition of TSGs and the newly registered product names).

Table 4 gives a detailed breakdown of growth in value. Since the last study, new registered products represent 21 % of the increase in value; followed by French wines and Italian wines that, together, represent 30 % of the growth between 2010 and 2017.

¹⁰ Source: EU Food&Drink Industry

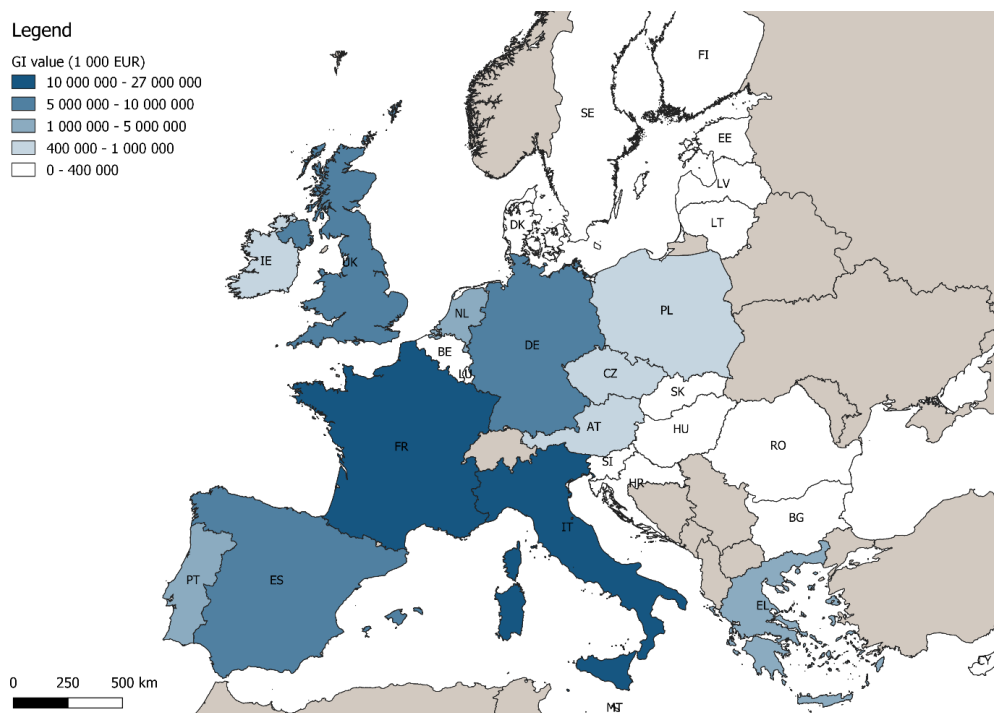
Table 4 – Breakdown of the growth of the GI/TSG value between 2010 and 2017

	Growth in value (thousand EUR)	% in the total growth in value
Value of new registered products (excl. TSGs)	4 708 635	20.8%
Wines – France (excl. new products)	3 928 259	17.4%
Wines – Italy (excl. new products)	2 913 118	12.9%
Value of TSGs	2 389 302	10.6%
Spirit drinks France (excl. new products)	1 378 082	6.1%
Wines – Spain (excl. new products)	957 951	4.2%
Agri – United Kingdom (excl. TSG and new products)	712 153	3.1%
Agri – Italy (excl. TSG and new products)	699 345	3.1%
Agri – France (excl. TSG and new products)	584 612	2.6%
Spirit drinks – United Kingdom (excl. new products)	308 379	1.4%
Value of HR GIs	130 515	0.6%
Other	3 924 544	17.3%
TOTAL	22 634 895	100.0%

Source: AND International study for DG AGRI

The map in Figure 2 shows that France and Italy were the leading MSs in terms of GI/TSG value in 2017, at more than EUR 10 billion. They were followed by Germany, the UK and Spain, with values between EUR 5 billion and EUR 10 billion, and Portugal, the Netherlands, Austria and Greece, with values between EUR 1 billion and EUR 5 billion. Each of the other 19 MSs had a GI/TSG value of less than EUR 1 billion.

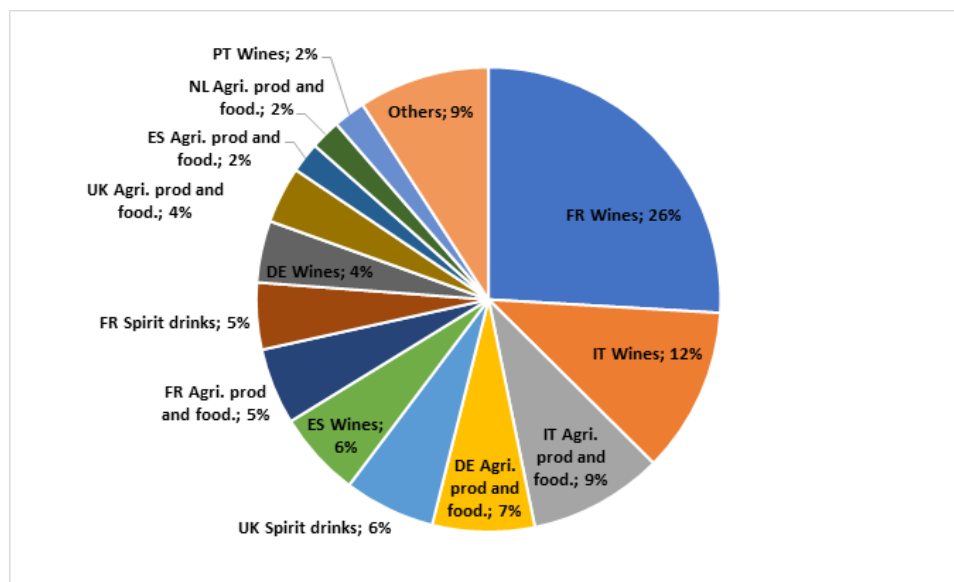
Figure 2 – Mapping of the EU28 according to the national GIs sales value in 2017 (excluding TSGs)



Source: AND International study for DG AGRI / FoodDrinkEurope

The leading sector within the EU28 was French wines, followed by Italian wines and Italian agricultural products and foodstuffs. In fourth place was German agricultural products and foodstuffs, followed by UK spirit drinks and Spanish wines. Together, these sectors gathered 64 % of the sales value within the EU28 in 2017.

Figure 3 – Sales value of GIs by Member State/sector (TSGs excluded), 2017



Source: AND International study for DG AGRI

E.2 Whole exports

Based on data collected with the survey and Comext data, we estimate that, in 2017, sales of GI/TSG products to non-EU countries represented 15.5% of extra-EU trade of food and beverages, considering that extra-EU trade of the overall food and drink sector accounted for EUR 110 billion¹¹.

In 2017, whole exports (intra-EU trade and exports to non-EU countries) accounted for EUR 32.10 billion (42% of the total sales value). Excluding TSGs, whole exports of GIs were estimated at 31.42 billion in 2017. Intra-EU trade accounted for EUR 15.07 billion (EUR 14.47 billion excluding TSGs) and exports to non-EU countries accounted for EUR 17.03 billion (EUR 16.95 billion excluding TSGs).

Table 5 – Trade of GI/TSG products by scheme, 2010 and 2017 (million EUR)

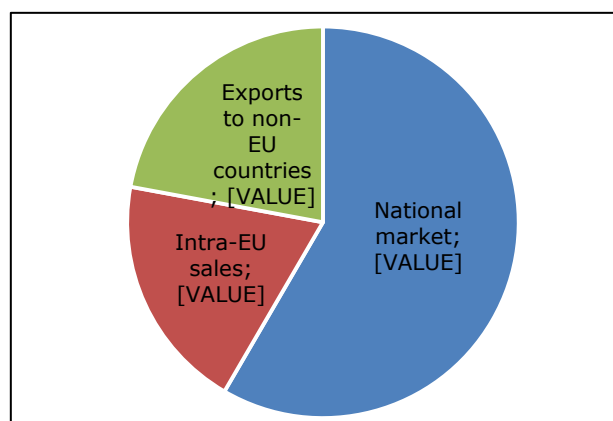
	2010				2017			
	Total sales	National market	Intra-EU market	Extra-EU market	Total sales	National market	Intra-EU market	Extra-EU market
Wines	29 630	18 244	6 352	5 034	39 418	23 151	7 711	8 557
Agri. products and foodstuffs	16 603	13 039	2 526	1 038	27 339	20 527	5 044	1 767
Spirit drinks	8 249	1 235	2 284	4 730	10 347	1 330	2 311	6 706
Aromatised wine products	31	23	4	4	43	37	3	3
Total GIs (excluding TSGs)	54 513	32 542	11 166	10 806	74 759	43 337	14 473	16 948
Total (GIs + TSGs)	na	na	na	na	77 148	45 045	15 069	17 033

Source: AND-International study for DG AGRI

¹¹ Source: EU Food&Drink Industry

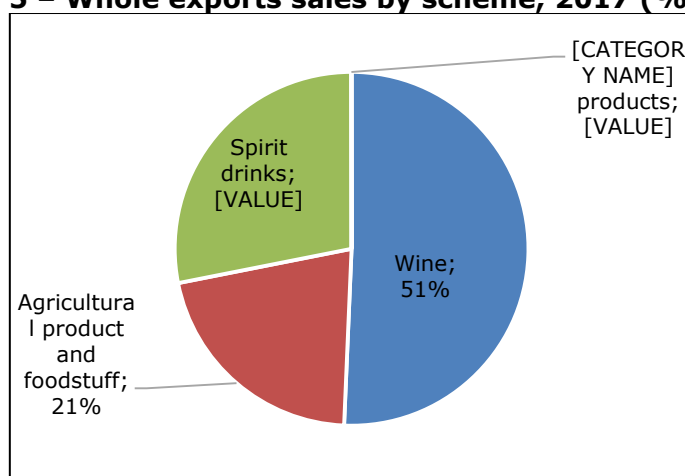
The importance of trade varied depending on the scheme. While agricultural products and foodstuffs represented 35% of the total sales value for GI/TSG products, they only amounted to 10% of extra-EU trade. On the contrary, spirit drinks accounted for 39% of extra-EU trade whereas they represented 13% of the total sales value. Wines remained the most important product both in terms of total sales value (51%) and extra-EU trade (50%).

Figure 4 – Sales value of GI/TSG products by destination, 2017 (%)



Source: AND-International study for DG AGRI

Figure 5 – Whole exports sales by scheme, 2017 (%)



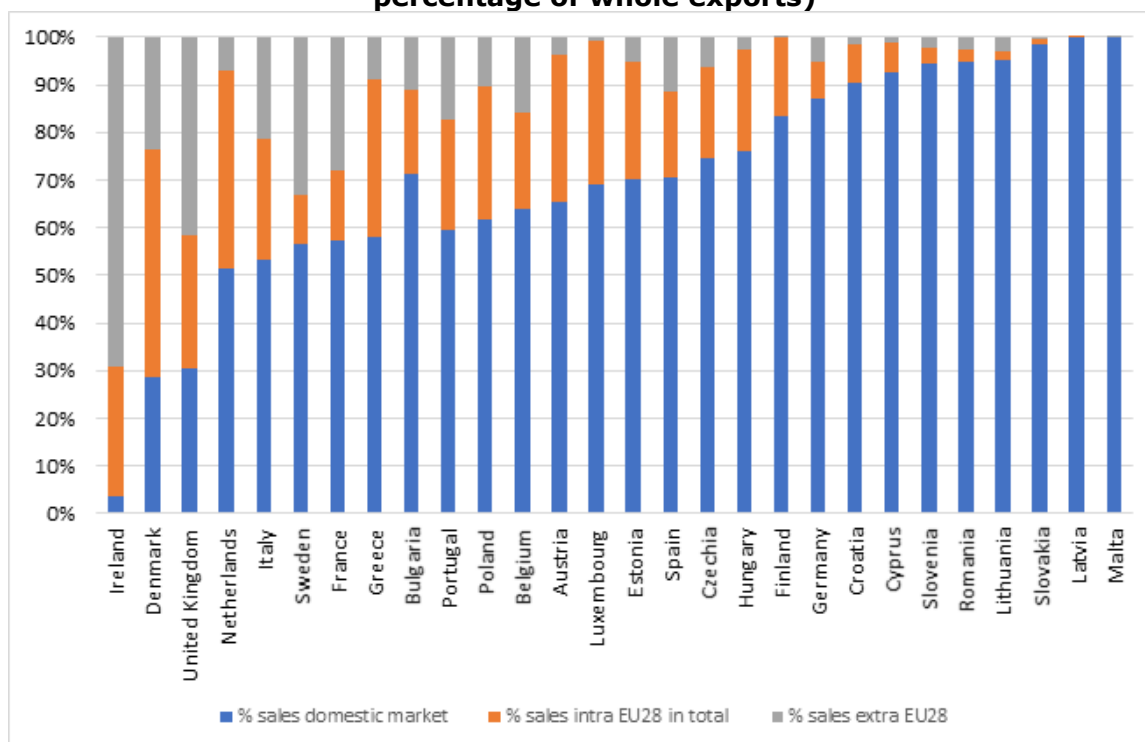
Source: AND-International study for DG AGRI

Exported European GI/TSG products to non-EU countries came mainly from France (44%), Italy (20%) and the United-Kingdom (19%). Products from these three MSs represented 83% of exports to non-EU countries of GI/TSG products. In these three cases, exports were pulled up by a very small number of designations: Champagne and Cognac in France, Grana Padano, Parmigiano Reggiano and Prosecco in Italy and Scotch Whisky in the UK.

The overall structure of trade has been fairly stable between 2010 and 2017. The national market remained the most important market for GI/TSG products with 58% of the total sales value, while intra-EU trade reached 20% of sales and extra-EU trade reached 22%.

The countries in which the share of whole exports was the highest were Ireland (Irish Whisky), Denmark (Danablu, Esrom), the UK (Scotch Whisky) and the Netherlands (Gouda Holland).

Figure 6 – Export profile of the Member States (sales of each market as a percentage of whole exports)



Source: AND-International study for DG AGRI

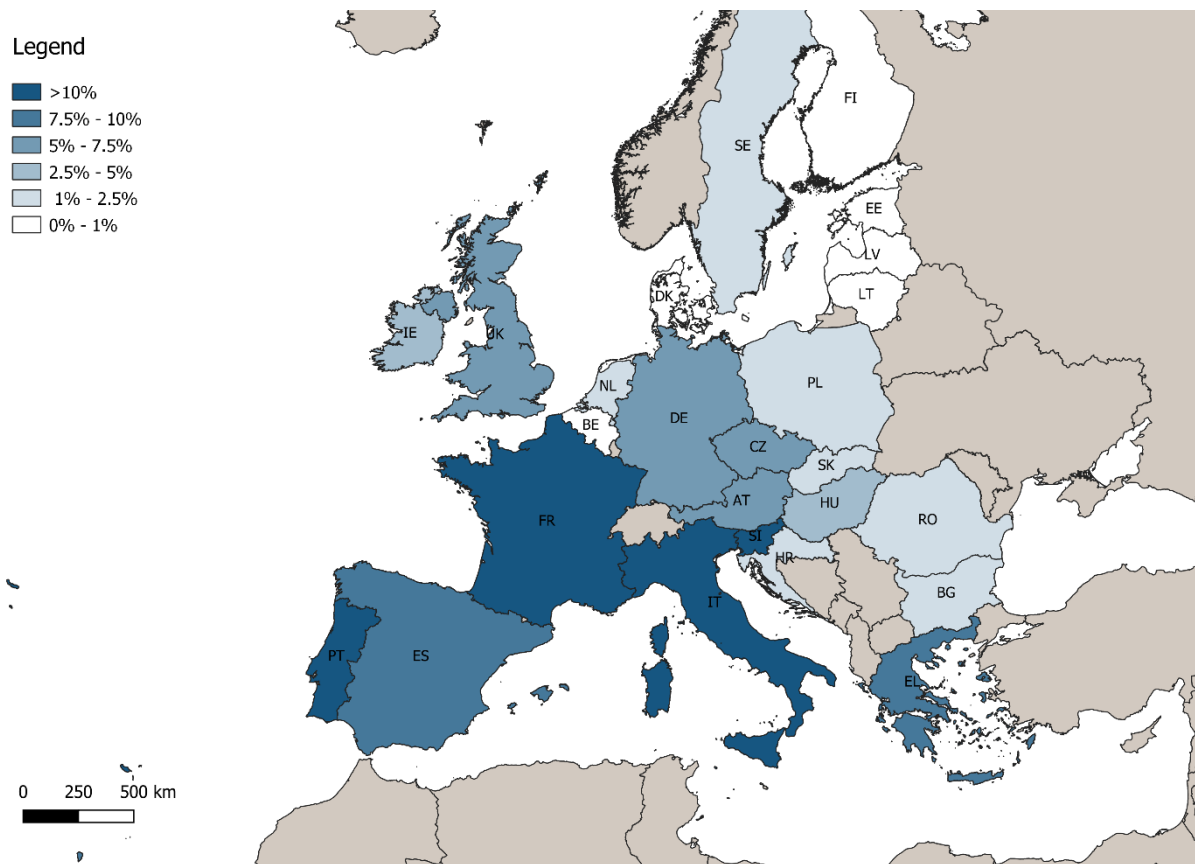
E.3 Importance of GIs/TSGs in the EU28 food and drink sector

The sales value of the European food and drink sector was estimated at EUR 1 182 billion in 2017 by the Confederation of the Food and Drink Industries in the EU28. The share of GI/TSG products was 7% in 2017.

We can see great differences between MSs:

- The GI/TSG sector in France accounted for 15% of the food and drink sector, due in large part to the large share of its vineyard under PDO.
- The share of GIs/TSGs is between 10% and 12% for three other MSs: Italy, Portugal and Slovenia.
- Greece, Spain, the UK, Czechia, Austria, Ireland and Germany show an important orientation through GI scheme (between 4% and 8%).
- The share of GIs is very limited in other MSs (2% and less).

Figure 7 – Share of the GIs/TSGs value in the food and drink sectors in 2017



Source: AND International study for DG AGRI / FoodDrinkEurope

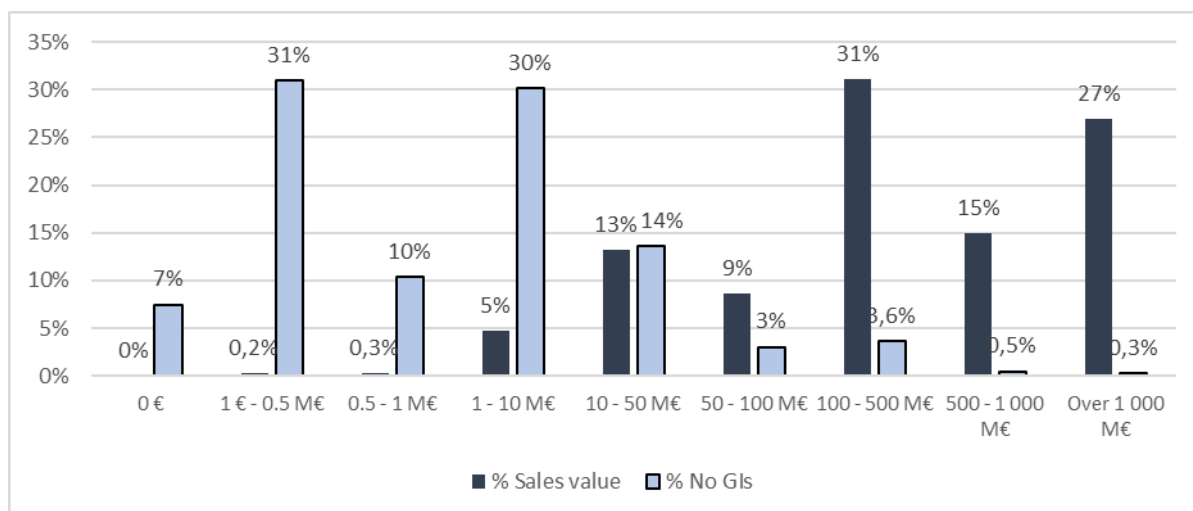
E.4 Individual size of GIs/TSGs

There were large differences of size between individual GIs/TSGs, ranging from a few thousand euros (or even no sales) to a few billion euros for a single GI/TSG.

If we consider the largest GIs in terms of sales value, in 2017, there were nine products (0.3% of the total number of products) with total sales over EUR 1 billion, these nine products accounted for 27% of the total sales value at EU28 level under GI. The next 15 products, with sales value between EUR 500 million and EUR 1 billion, accounted for 15% of total sales value and the next 113 products with total sales value between EUR 100 million and EUR 500 million accounted for 31% of the sales value. Thus, 137 GIs (4.3% of GIs) accounted for 73% of the total EU28 sales value and GIs in 2017.

If we consider the smallest GIs, 7% of the GIs were not on the market in 2017, the sales volume was under EUR 1 million for 41% of them, accounting for 0.5% of the total sales value under GI. The sales value of 30% of the GIs ranged from EUR 1 million to EUR 10 million and accounted for 5% of total sales value.

Figure 8 - Share of total sales value and of the number of GIs by size, 2017 (%)



Source: AND-I study for DG AGRI

The calculation of the average sales value by GI and the median of sales value illustrates the concentration of the sales value among a limited number of GIs. Indeed, while the average sales value was EUR 23.8 million in 2017, the mean value was EUR 1.1 million. This indicates that the sales value of 50% of the GIs was lower than EUR 1.1 million and was higher for another 50%. The detail of means and median for each sector are detailed in the following table. Regarding TSGs, the mean was EUR 44.2 million and the median was EUR 1.5 million in 2017.

Table 6 - Means and median of total sales value by GI in 2017 (1 000 euros)

	Agri-food products	Wine	Spirit	Total
Means	19 163	25 012	39 950	23 793
Median	1 032	1 228	667	1 090

Source: AND-I study for DG AGRI

E.5 Objectives pursued with quality schemes and economic impacts

GIs have been developed and supported by public authorities since the 19th century. An analysis by Sylvander *et al.* (2006)¹² indicates that GIs have been developed for various objectives over time, and these different objectives have a direct impact on the economic features observed. Sylvander *et al.* identified several objectives for the support of GIs:

- **Competition:** GIs were originally developed as an intellectual property tool to prevent misuse of product names in the market. This was developed at international level with the Paris and Madrid Conventions (1883 and 1891, respectively). This mainly aims at protecting products sold outside of their production area. Within the area of production, consumers are more capable of assessing the quality of the product, so there is less need of protection against misuse of the name. This means that, to start with, GIs covered:

1) products with significant economic value (i.e. sufficient economic value to be exported rather than being consumed only in the area of production);

2) processed / preserved products, meaning products which could travel before the development of refrigeration systems. Thus, initially, GIs mainly covered hard cheeses, hams, wines and spirit drinks.

This objective for developing GIs explains the large economic importance of hard cheese, ham, wine and spirit drinks in GIs economics with very large denomination of, for example: hard cheeses and ham in Northern Italy, Scotch Whisky and, French and Italian wines. This objective is still pursued by GIs that have been registered recently. We should note that, when this objective is pursued, the most important aspect for stakeholders is use of the protected name to prevent competitors from using it, use of the GI "logo" and communication of the "GI" status may be secondary.

- **Market regulation:** The GI scheme was developed at EU level with the Common Market Organisation (CMO) wine in the 1970s. In a context of overproduction, GIs aimed at producing less wine, but of better quality. Thus, GIs are deeply rooted in the EU policy for the wine sector. This explains why the economic weight of GIs is so important in the wine sector and explains the high price premium for wine under PDO/PGI compared to wine without a GI. However, these barriers between market segments are not rigid, and some PGIs or wines without GIs may develop in high-quality markets, while some PDOs may be sold in lower-range markets.
- **Rural development:** Quality schemes (GIs and TSGs) have more recently been developed with the objective of supporting small and/or specific supply chains with a rural development objective. Quality schemes are perceived as tools for differentiation in the market in a context of global competition. At EU level, this has been developed through the 1992 Regulation on PDOs and PGIs. The economic impact is the development of a large number of PDOs and PGIs, with, in some cases, low sales value. This also led to the development of quality schemes in sectors other than the traditional ones: fruits and vegetables, fresh meats, seafood products, etc. When this objective is pursued, access to 'GI/TSG status' is important for stakeholders, as it is assumed to be a positive signal for consumers (in terms of quality and differentiation). The prevention from misuse of the protected name may be limited for some of these products.

¹² Sylvander, B., Allaire, G., Belletti, G., Marescotti, A., Barjolle, D., Thévenod-Mottet, E., Tregear, A. (2006). Qualité, origine et globalisation : Justifications générales et contextes nationaux, le cas des Indications Géographiques. Canadian Journal of Regional Science, 29 (1), 43-54. <https://prodira.inra.fr/?locale=fr#!ConsultNotice:32016>

The success of such products is based on stakeholders' strategies and their capacity to implement a collective project.

- Patrimony: in the 2000's, quality schemes were also promoted in order to preserve the patrimony (genetic resources, landscape, cultural heritage...). The positive impact is the inclusion, on a voluntary basis, of new requirements for GIs/TSGs, related to environment for instance. This also deepened the impacts observed for the justification with "rural development": registration of GIs/TSGs with limited economic value.

As a consequence, based on literature and qualitative interviews, GIs/TSGs have the following possible impacts on the supply chain:

- protection as intellectual property right (only for GIs),
- market regulations, this is possible in the wine (planting scheme linked to quality schemes in relation with Article 63 of CMO Regulation¹³) and cheese sectors (as detailed in Article 150 of CMO Regulation: "Regulation of supply for cheese with a protected designation of origin or protected geographical indication"),
- Differentiation in the market, the impact of GIs on the market and "country of origin effect" depend on the markets. As an illustration, based on Eurobarometer (2018), 18% of EU28 consumers were aware of PDO and PGI logos and 15% of TSG logo: from 5% for the PDO logo in Denmark, Malta, Romania and the United Kingdom to 45% for the PDO logo in France¹⁴. As a comparison, 37% of consumers were aware of fairtrade logo and 27% for organic farming. Depending on the strategy of the supply chain, GIs/TSGs may constitute the premium range of a whole supply chain (with high price premium, such as poultry under PGI in France being a premium product compared to a non-GI product) or include a large share of the regional production as a signature of the region (for instance PGI Welsh Beef or PGI Gouda Holland).
- Quality insurance, the implementation of a GI/TSG increases the number of procedures and controls, which improves quality management at the level of the supply chain. In a context of increased demand for reassurance in the food and drink sector (development of retailers' standards, GLOBAL GAP, IFS, BRC...), quality schemes such as GIs/TSGs are positive signals.
- Other indirect impacts on the territory, depending on the requirements of GI/TSG specifications on the environment, social aspects (for instance, depending on the origin of the raw material), preservation of local skills, link with tourism (image of the territory, local consumption by tourists).

These are potential positive impacts. While some GIs/TSGs are success stories, other GIs/TSGs meet limited development or are even not used any longer. Based on literature¹⁵ the drivers for success of GIs/TSGs may be summarized as follows:

¹³ Regulation (EU) No 1308/2013 of the European Parliament and of the Council of 17 December 2013 establishing a common organisation of the markets in agricultural products and repealing Council Regulations (EEC) No 922/72, (EEC) No 234/79, (EC) No 1037/2001 and (EC) No 1234/2007

¹⁴ Source: special Eurobarometer 473 (2018) – Europeans, Agriculture and the AP

http://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_389_en.pdf

¹⁵ *Facteurs de succès des produits d'origine certifiée dans les filières agro-alimentaire*, D. Barjolle 1, B. Sylvander, 2003

- the cooperation of stakeholders to define and implement a collective strategy (regarding marketing and quality);
- the specificity of the product,
- the good definition of the GI/TSG specifications, coherent with current practices of farmers and producers,
- adequacy of the product with the market demand (and thus based on relevant marketing analysis);
- the attractiveness of the GI/TSG for stakeholders when they compare the potential benefits (possible differentiation on the market, quality, collective action) and costs (compliance with requirements, administrative burden, controls).

Competitive position of some PDO cheeses on their own reference market - identification of the key success factors, BARjolle, Chapuis and Dufour, 2005

La governance come fattore di successo dei prodotti tipici: alcune riflessioni a margine di una ricerca europea, Filippo Arfini, 2006

Etude transversale sur les Signes d'Identification de la Qualité et de l'Origine (SIQO) dans la filière fruits et légumes, AND-I pour FranceAgriMer and Interfel, 2017

E.6 Clustering of GIs/TSGs based on size (sales value) and price premium

We propose a clustering approach of the GIs/TSGs based on two parameters: the sales value (economic size) and the price premium (differentiation on the market), 2017 data are used. The analysis of price premium is developed in chapter 3 of the report. We identify five clusters which include both GIs and TSGs and products from each sector: agri-food products, wines, spirit drinks and aromatised wine products.

Cluster 1 – GIs/TSGs high sales and high price premium (for instance: Champagne and Parmigiano Reggiano)

These GIs/TSGs benefited of high price premium and met a large development on the market in terms of sales value (over EUR 10 million). These GIs/TSGs were top of the range products and success stories. They had a strong impact in the territories where they were located. This covered 16% of the number of GIs/TSGs.

Cluster 2 – GIs/TSGs with important volume and low-price premium (for instance: regional wine and fresh meat)

The sales value of each GI/TSG from this group was high (over EUR 10 million and even over EUR 100 million for some of them) but price premium remained limited. This means that GIs/TSGs were not used as a differentiation on the market but may be used for other reasons by stakeholders: quality management, signature of the origin, implementation of a collective strategy, intellectual property rights (for GIs only). Whatever the benefits producers get from the GI/TSG, the important sales value shows they had an interest in being involved in the scheme. This covered 6% of the number of GIs/TSGs.

Cluster 3 – GIs/TSGs with limited volume and high price premium (for instance: essential oils and other very specific products)

This cluster covers GIs/TSGs with low sales value (below EUR 10 million) but high or extremely high price premium. These were niche markets. These GIs/TSGs may be a signal for consumers for the quality of a specific product. This covered 40% of the number of GIs/TSGs.

Cluster 4 – GIs/TSGs with moderate sales value and limited price premium

The sales value of the GIs/TSGs in this group ranged from EUR 1 million to EUR 10 million. This means there was a moderate development on the market. In addition, the price premium remains limited. This covered 11% of the number of GIs/TSGs.

Cluster 5 – GIs/TSGs with limited sales value and limited price premium

The sales value of each of these GIs/TSGs was under EUR 1 million (this also included GIs/TSGs with no sales in 2017) and the price premium was low or moderate. This means there was a limited development of the product on the market in terms of volume and low differentiation. This covered 28% of the number of GIs/TSGs.

F. ANALYSIS BY SECTOR

F.1 Agricultural products and foodstuffs

F.1.1 Value by product category

F.1.1.1 General overview

The total sales volume of agricultural products and foodstuffs covered by GIs and TSGs in 2017 was 10 004 270 t and the total sales value was EUR 27.34 billion. Excluding TSGs, the sales value of agri-food products under GIs reached EUR 24.95 billion. PGI products accounted for 54% of the EU sales value in 2017 while PDO and TSG products represented 38% and 9%, respectively, of the total sales value.

The sector of agricultural products and foodstuffs covered by GIs and TSGs has increased by 39% since 2010. PGI products are the most dynamic and their sales have grown by 60% between 2010 and 2017. TSG products have grown by 50% since 2011 and PDO sales value has increased to a lesser extent by 15% since 2010.

In terms of growth contribution between 2010 and 2017, PGI products contributed to 72% of the EU sales value growth followed by PDO and TSG products which represented respectively 18% and 10% of the growth.

Table 7: Sales value of agricultural products and foodstuffs under GI/TSG in the EU (million EUR)

AGRI-FOOD	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010 (TSG evol 2017/2011)	% of growth
PDO	7 401	8 716	8 953	9 058	8 911	9 275	9 388	9 810	10 310	38%	15%	18%
PGI	6 166	7 887	9 131	10 367	10 795	12 035	13 014	14 361	14 640	54%	60%	72%
TSG	0	0	1 588	2 009	2 216	1 758	1 312	1 902	2 389	9%	50%	10%
GI (PDO + PGI)	13 566	16 603	18 083	19 425	19 706	21 310	22 402	24 171	24 950	91%	38%	90%
Total	13 566	16 603	19 672	21 433	21 922	23 068	23 714	26 074	27 339	100%	39%	100%

Source: AND-International study for DG AGRI

Table 8: Sales volume of agricultural products and foodstuffs under GI/TSG in the EU (million EUR)¹⁶

AGRI-FOOD	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
PDO	1 969	3 091	1 668	1 775	1 783	1 836	1 882	1 884	1 975	20%	18%	11%
PGI	3 414	5 233	5 398	5 685	5 843	6 235	6 719	7 207	7 149	71%	32%	65%
TSG	0	0	234	314	344	320	283	391	879	9%	276%	24%
Total	5 383	8 324	7 300	7 774	7 970	8 391	8 884	9 482	10 004	100%	37%	100%

Source: AND-International study for DG AGRI

The four largest categories of agricultural products and foodstuffs sold under GIs (excl. TSGs) in terms of sales value in 2017 are as follows:

- Cheeses represented more than one third of the total EU28 sales value for GIs agri-food products. This category of products has increased by 43% since 2010 and contributed the most to the growth of the agri-food sector with 32%.

¹⁶ The decrease of PDO volume sales between 2010 and 2011 is due to the exclusion of natural mineral waters and spring waters from EU quality schemes.

- Meat products (including cooked, salted, smoked, etc) accounted for 16% of the total sales value. This category has grown by 24% since 2010 and contributed to 9% of the growth.
- Beers represented 13% of the agri-food sector under GIs in 2017. Beers sales value has grown by 16% but only contributed to 6% of the sector growth since 2010.
- Fresh meats and offal represented 12% of the total EU28 sales value for agri-food products. It has almost doubled (+97%) since 2010 and is the second largest contributor with 18% of the growth.
- Fruits, vegetables and cereals and fresh fish, molluscs and crustaceans represent, respectively, 8% and 4% of the total sales value and have a growth rate of 97% and 150% since 2010. These categories contributed to 11% and 8%, respectively, of the growth.

The smallest product categories in terms of value (less than EUR 1 bn in 2017) were : other products of Annex I of the Treaty (3%); bread, pastry, cakes, etc. (2%); oils and fats (2%), pasta (2%) and other products not included in Annex I (3%). These categories make up 10% of the total sales and have contributed to 15% of the growth since 2010.

Table 9 - Sales value under GIs per category of agri-food products in EU (million EUR)

Agri-food sales value	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/10	% of growth
Cheeses	5 276	6 308	6 689	7 149	7 176	7 714	8 010	8 522	8 993	36%	43%	32%
Meat products	2 395	3 190	3 312	3 135	3 204	3 475	3 732	4 089	3 955	16%	24%	9%
Beers	2 301	2 859	2 973	3 080	3 084	3 171	2 854	3 147	3 327	13%	16%	6%
Fresh meat (and offal)	1 319	1 515	1 646	2 070	2 175	2 237	2 658	2 982	2 980	12%	97%	18%
Fruit, vegetables and cereals	771	986	1 075	1 343	1 389	1 603	1 658	1 907	1 940	8%	97%	11%
Fresh fish, molluscs, and crustaceans	528	443	637	691	775	881	901	983	1 109	4%	150%	8%
Other products of Annex I	107	369	618	741	581	715	717	853	852	3%	131%	6%
Bread, pastry, cakes etc.	291	279	312	377	401	442	742	509	567	2%	104%	3%
Oils and fats	359	348	428	437	417	494	522	537	555	2%	59%	2%
Other products ¹⁷	218	306	395	403	503	577	607	643	672	3%	119%	4%
Total	13 566	16 603	18 083	19 425	19 706	21 310	22 402	24 171	24 950	100%	50%	100%

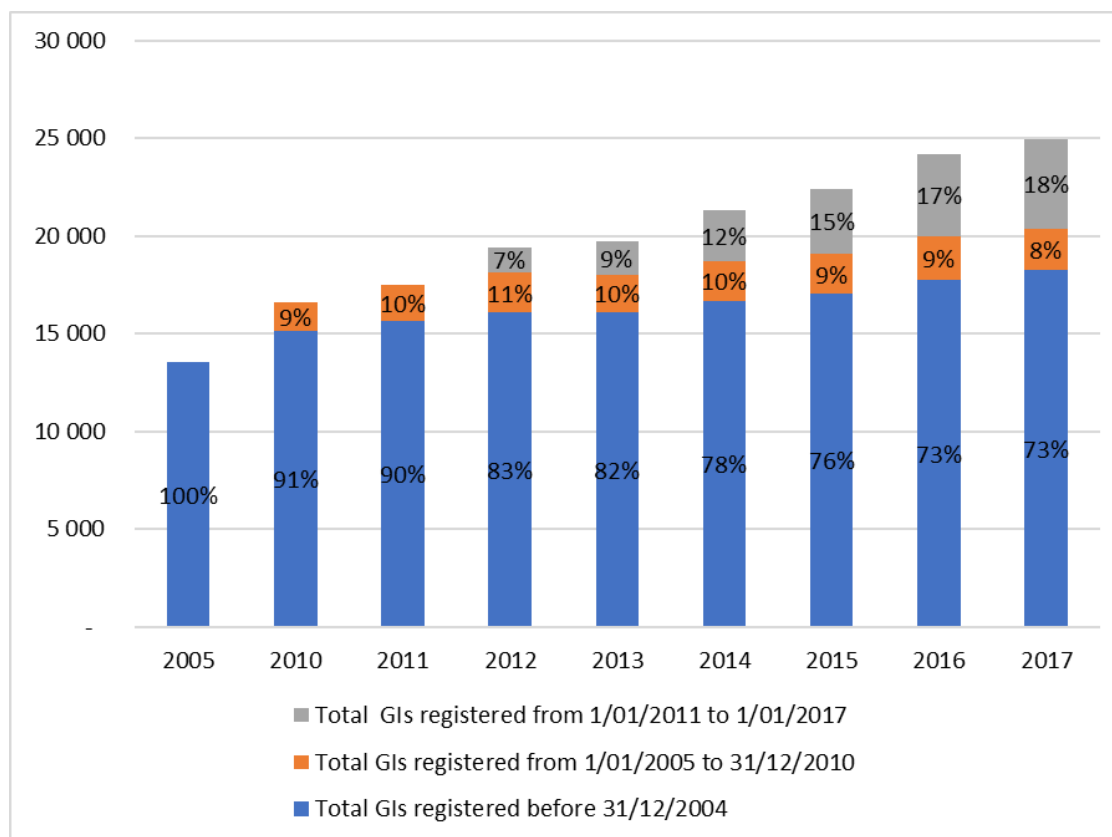
Source: AND-International study for DG AGRI

Agri-food products covered by GIs (excl. TSGs) registered before 31 December 2004 represented the largest part of the sales value in 2017 with 73% of the total sales, followed by products registered after the 1 January 2010 which represent 18% and products registered between 1 January 2005 and 31 December 2009 which represent 9%.

The products that contributed the most to the 2010-2017 growth were the most recent products (registered date after 1 January 2010) with 55% of growth contribution, and the oldest products registered (before 31 December 2004) with 38% of the growth.

¹⁷ 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).

Figure 9 : Evolution of GIs agri-food products sales value by date of registration since 2005 in EU (million EUR)



Source: AND-International study for DG AGRI

F.1.1.2 Agricultural products and foodstuffs sales value by MS

The top three MSs in terms of agri-food GIs sales gathered 65% of the total sales value in 2017 and 47% of the total number of GIs registered:

- Italy with 28.1% of the total sales value and 22% of the GIs registered
- Germany with 21.3% of the total sales value and 6.8% of the GIs
- France with 15.9% of the total sales value and 18.2% of the GIs

A second group of three MSs accounted for 24.6% of the sales value in 2017 and 20% of the GIs registered:

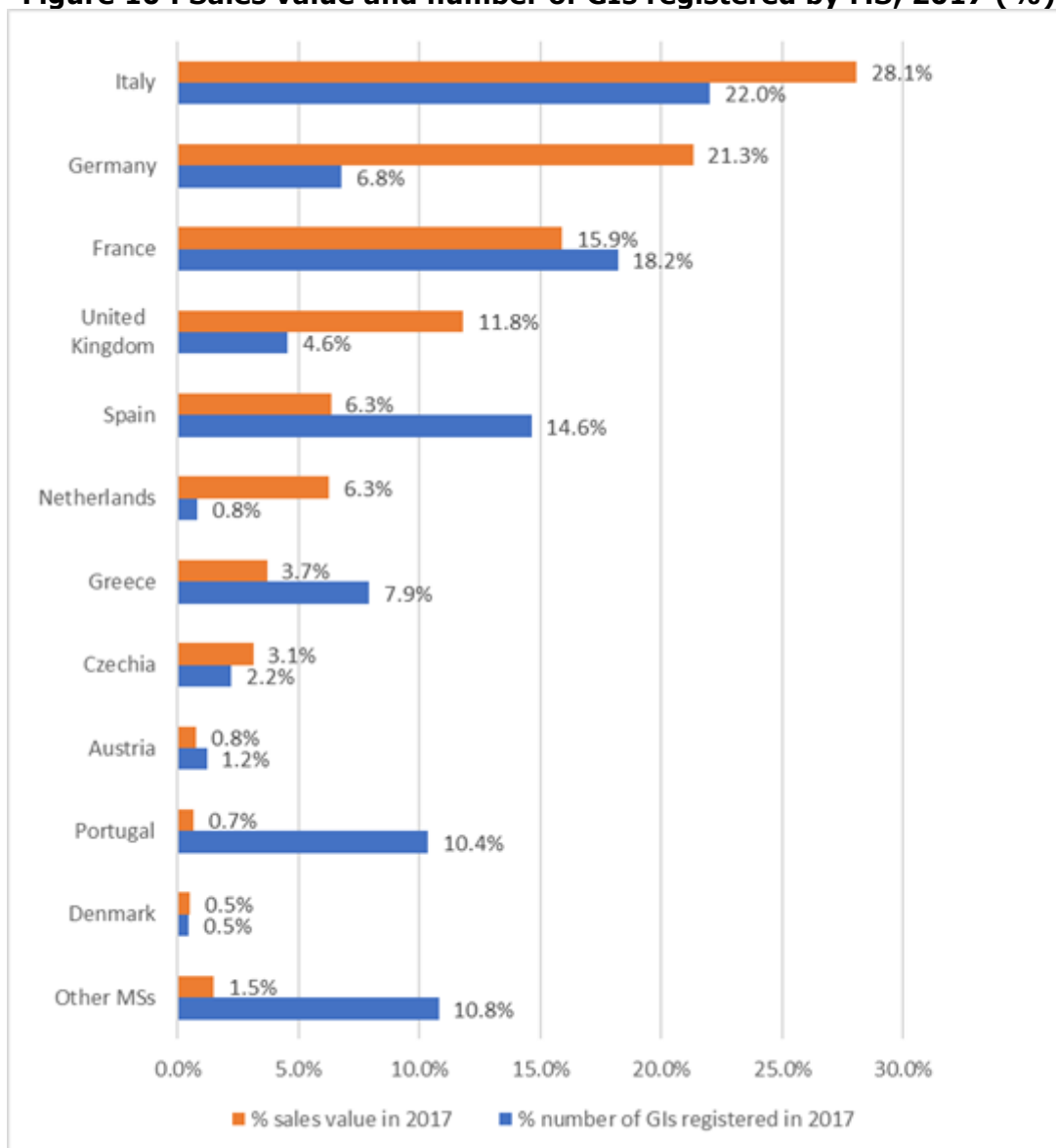
- The UK with 11.8% of the total sales value and 4.6% of the GIs
- Spain with 6.3% of the total sales value and 14.6% of the GIs
- The Netherlands with 6.3% of the sales value for 0.8% of the GIs registered

A third group of five MSs (ordered by sales value: Greece, Czechia, Austria, Portugal, Denmark) gathers 8.8% of the total sales value in 2017 for 22.2% of the GIs registered. Portugal stands out particularly with 10.4% of the number of GIs registered.

A fourth group of 15 MSs (ordered by sales value : Poland, Hungary, Sweden, Finland, Belgium, Slovenia, Slovakia, Bulgaria, Luxembourg, Ireland, Lithuania, Croatia, Romania, Cyprus and Latvia) accounted for 1.5% of the total sales value and 10.8% of the total number of GIs registered in 2017.

Finally, a last group of 2 MSs (Estonia and Malta) in which there were not any sales of agri-food GIs/TSGs.

Figure 10 : Sales value and number of GIs registered by MS, 2017 (%)



Source: AND-International study for DG AGRI

F.1.1.3 Cheeses

In 2017, the total sales volume of cheeses covered by GIs and TSGs reached 1 243 161 t and the value of sales was EUR 9.03 billion for a total of 241 GIs/TSGs of registered cheese (including 6 TSGs). The sales value of cheeses under GIs (excluding TSGs) reached EUR 8.99 billion in 2017. Cheeses sales value increased by 43% from 2010. PDO and PGI products equally contributed to the growth of this category of product.

Table 10 - Sales value of cheese products and foodstuffs under GIs and TSGs in the EU (million EUR)

Cheeses	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010 (TSG evol 2017/2011)	% of growth
PDO	5 071	6 078	6 292	6 565	6 455	6 668	6 791	7 027	7 381	82%	21%	48%
PGI	205	230	397	584	721	1 046	1 219	1 494	1 611	18%	600%	51%
TSG	0	0	35	36	37	35	34	39	38	0%	9%	1%
GI (PDO + PGI)	5 276	6 308	6 689	7 149	7 176	7 714	8 010	8 522	8 993	100%	34%	100%
Total	5 276	6 308	6 724	7 185	7 213	7 749	8 044	8 561	9 031	100%	43%	100%

Source: AND-International study for DG AGRI

Among the 19 MSs producing cheese, Italy, France and the Netherlands are the largest cheese GI producers and accounted for 82% of the total EU cheese sales value in 2017:

- Italy represented 44% of the sales value and 19% of the contribution to growth. The largest Italian cheese GIs are "Grana Padano PDO", "Parmigiano Reggiano PDO" and "Mozzarella di Bufala Campana PDO".
- France accounted for 23% of the sales value and 13% of the contribution to the growth. Five GIs "Comté PDO", "Roquefort PDO", "Reblochon PDO"¹⁸, "Cantal PDO"¹⁹ and "Saint-Nectaire PDO" represented more than half of the volume sales of the French GI cheeses.
- The Netherlands represents 17% of sales value and more than half of the growth observed. The Dutch cheese sector has thrived thanks to the registration of "Gouda Holland PGI" in 2010 and "Hollandse geitenkaas PGI" in 2015.

Table 11 - Sales value of cheeses under GIs (excl. TSGs) by MS in the EU (million EUR)

Cheeses	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evolution 2017/2010	% of growth
Italy	2 848	3 426	3 754	3 885	3 622	3 673	3 629	3 737	3 930	44%	15%	19%
France	1 306	1 572	1 538	1 636	1 687	1 790	1 878	1 874	1 928	21%	23%	13%
Netherlands	96	90	254	455	634	885	1 089	1 410	1 559	17%	1627%	55%
Greece	517	663	561	580	632	658	681	748	793	9%	20%	5%
Spain	161	186	199	200	203	234	253	271	284	3%	53%	4%
United Kingdom	98	87	82	89	91	142	145	146	148	2%	70%	2%
Denmark	99	105	121	121	121	121	121	121	121	1%	15%	1%
Germany	40	50	62	65	68	75	78	81	85	1%	71%	1%
Other MS	112	129	117	119	119	136	137	133	144	2%	12%	1%
Total	5 276	6 308	6 689	7 149	7 176	7 714	8 010	8 522	8 993	100%	43%	100%

Source: AND-International study for DG AGRI

¹⁸ Where "Reblochon" is mentioned, the name refers to "Reblochon/Reblochon de Savoie"

¹⁹ Where "Cantal" is mentioned, the name refers to "Cantal/Fourme de Cantal/Cantalet".

The GI cheese sector is mainly dominated by cow cheese:

- Cow cheese was the main cheese subcategory and accounted for three quarters of the EU sales value and growth contribution. The GIs that contributed the most were "Gouda Holland PGI", "Noord-Hollandse Gouda PDO" and "Parmigiano Reggiano PDO".
- Mixed milk cheese was the second subcategory with 9% of the sales value but contributed to a lesser extent to growth contributing to 5%. The largest GIs are "Feta PDO" and "Kasseri PDO".
- With 7% of the sales value, sheep cheese contributed to 4% of the cheese sector growth. "Roquefort PDO" is the largest GI for this category of cheese, followed by "Queso Manchego PDO".
- Buffalo cheese accounted for 4% of the sales value and growth contribution. "Mozzarella di Bufala Campana PDO" is the only buffalo cheese under GI in the EU28.
- Goat cheese sales value reached 4% of the cheese sales value in 2017. It increased quickly and contributed to 10% of the growth of the sector, thanks to the registration of "Hollandse geitenkaas PGI".

Table 12 - Sales value under GIs (excl. TSGs) per subcategory of cheese in EU (million EUR)

Subcategory	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Cow cheese	3 895	4 654	5 213	5 571	5 546	6 019	6 073	6 251	6 724	75%	44%	77%
Mixed cheese	558	707	594	612	666	693	716	785	829	9%	17%	5%
Sheep cheese	442	535	475	564	558	595	745	732	650	7%	21%	4%
Buffalo cheese²⁰	279	290	288	282	281	283	345	372	391	4%	35%	4%
Goat cheese	90	107	108	108	111	111	116	366	379	4%	256%	10%
Other milk cheese	14	15	11	12	13	13	15	16	19	0%	26%	0%
Total	5 276	6 308	6 689	7 149	7 176	7 714	8 010	8 522	8 993	100%	43%	100%

Source: AND-International study for DG AGRI

In Italy, GI cheeses represented 22%²¹ of national cheese production in 2016. This share was relatively stable over the period, though the annual growth rate for GI cheeses was lower (+1.4%/year) than the national growth rate for cheese (+2.8%/year).

In France, GI cheeses represented 7%²² of the national cheese production. The annual growth rate for GIs cheese was more important than the national cheese growth rate (3.0%/year vs 2.3%/year) over the 2010-2016 period.

The Greek GI cheese sector was the most important in terms of market share and accounted for 36%²³ of the national production in 2016. While the annual growth rate was negative for the national cheese sector (-0.3%/year), the annual growth rate for GIs cheese reached 2.0%/year over the period.

²⁰ Public data available from ISMEA – QUALIVITA 2018 – "Rapporto Ismea-Qualivita" 2018 p.2
<http://www.ismea.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/10497>

²¹ Estimate elaborated by AND-I based on Eurostat/SBS data

²² Estimate elaborated by AND-I based on Eurostat/SBS data

²³ Estimate elaborated by AND-I based on Eurostat/SBS data

In Spain, the GI cheeses represented only 3%²⁴ of the national cheese production. As for Greece, the GI cheese sector grows faster (+6.5%/year) than the general cheese industry (-0.1%/year).

F.1.1.4 Meat products

In 2017, the sales volume of meat products covered by GIs/TSGs is estimated at almost 643 119 t and the sales value was EUR 5.47 billion for a total of 183 registered GIs/TSGs (including 14 TSGs). The sales value of meat products under GIs (excluding TSGs) reached EUR 3.96 billion in 2017. Meat products sales value grew by 71% from 2010. TSGs products mainly contributed to this growth (66%) followed by PGI products (36%) while the sales value of PDO meat products decreased by 3% over the period.

Table 13 - Sales value of meat products under GIs and TSGs in the EU (million EUR)

Meat products	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010 (TSG evol. 2017/2011)	% of growth
PDO	1 237	1 449	1 530	1 262	1 202	1 237	1 227	1 355	1 405	26%	-3%	-2%
PGI	1 158	1 741	1 782	1 874	2 003	2 238	2 504	2 734	2 550	47%	46%	36%
TSG	0	0	1 484	1 900	2 106	1 602	1 123	1 457	1 514	28%	2%	66%
GI (PDO + PGI)	2 395	3 190	3 312	3 135	3 204	3 475	3 732	4 089	3 955	72%	19%	96%
Total	2 395	3 190	4 796	5 036	5 310	5 077	4 855	5 545	5 469	100%	71%	100%

Source: AND-International study for DG AGRI

Among the 18 MSs producing meat products, two countries contributed to 82% of GI meat products sales value:

- Italy accounted for more than half of meat product sales value in 2017 and to 25% of the growth. The largest Italian GIs are "Prosciutto di Parma PDO", "Prosciutto di San Daniele PDO", "Mortadella Bologna PGI" and "Bresaola della Valtellina PGI".
- Germany accounted for 30% of the value share of and contributed to 57% of the growth. The largest German GIs are "Schwarzwälder Schinken PGI", "Thüringer Rostbratwurst PGI" and "Nürnberger Bratwürste PGI".
- France and Spain gathered 14% of the production and contributed to 4% of the growth.

The other 14 MSs accounted for 4% of sales value and contributed to 13% of the growth of the sector.

Table 14 – Sales value of meat products under GIs (excl. TSGs) by MS in the EU (million EUR)

Meat products	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Italy	1 612	1 871	1 979	1 771	1 753	1 818	1 827	2 016	2 064	52%	10%	25%
Germany	401	739	748	814	895	1 039	1 224	1 387	1 178	30%	60%	57%
France	214	356	361	336	316	346	392	423	425	11%	19%	9%
Spain	134	166	151	142	134	157	164	124	129	3%	-22%	-5%
Other MSs	34	58	73	71	107	115	125	138	159	4%	174%	13%
Total	2 395	3 190	3 312	3 135	3 204	3 475	3 732	4 089	3 955	100%	24%	100%

Source: AND-International study for DG AGRI

²⁴ Estimate elaborated by AND-I based on Eurostat/SBS data

Cured meat products under GIs represented 73% of the total sales value and contributed to two thirds of the growth in 2017. The GIs that contributed the most to this growth were "Schwarzwälder Schinken PGI" and to a lesser extent "Westfälischer Knochenschinken PGI".

Cooked meat products accounted for 27% of the total sales value in 2017 and grew by 29% from 2010. The cooked meat GIs that contributed the most to the 2010-2017 growth was "Mortadella Bologna PGI".

Table 15 - Sales value under GIs (excl. TSGs) per subcategory of meat products in the EU (million EUR)

Subcategory	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Cooked meats	593	823	833	864	953	990	1 042	1 102	1 059	27%	29%	31%
Cured meats	1 802	2 367	2 479	2 271	2 251	2 485	2 690	2 986	2 896	73%	22%	69%
Total	2 395	3 190	3 312	3 135	3 204	3 475	3 732	4 089	3 955	100%	24%	100%

Source: AND-International study for DG AGRI

Italian meat products value covered by GIs accounted for 20%²⁵ of the Italian production in 2016. The annual growth rate of GI products was equivalent to the general sector over the 2010-2016 period (1.3%/year for GIs versus 1.3%/year for non-GIs).

In Germany, meat products under GI represented 6%²⁶ of the national sector in 2016. The annual growth rate for GIs was higher than for the general sector (11.1%/year versus 1.2%/year) thanks to the registration of new GIs.

For France, the share for meat products covered by GIs reached 4%²⁷ of the national production and had an annual growth rate of 2.9%/year in comparison to the 0.1% of the sector.

F.1.1.5 Beers

In 2017, the sales volume of beers covered by GIs/TSGs is estimated to reach 41.81 million hl and the sales value was EUR 3.37 billion for a total of 26 registered GIs/TSGs (including 6 TSGs). The sales value of beers under GIs (excluding TSGs) reached EUR 3.33 billion. Beer sales value has increased by 18% from 2010 and PGI beers contributed almost entirely to this growth.

Table 16 - Sales value of beers under GIs and TSGs in the EU (million EUR)

Beers	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010 (TSG evol 2017/2011)	% of growth
PGI	2 301	2 859	2 973	3 080	3 084	3 171	2 854	3 147	3 327	99%	16%	92%
TSG	0	0	34	34	35	37	38	39	41	1%	21%	8%
Total	2 301	2 859	3 007	3 114	3 119	3 208	2 892	3 186	3 368	100%	18%	100%

Source: AND-International study for DG AGRI

²⁵ Estimate elaborated by AND-I based on Eurostat/SBS data

²⁶ Estimate elaborated by AND-I based on Eurostat/SBS data

²⁷ Estimate elaborated by AND-I based on Eurostat/SBS data

Only five MSs currently produce beer under GIs or TSGs. Germany and Czechia provided almost all the value of sales in 2017.

- Germany is the leading GI beer producer representing 79% of the total sales value in 2017. The German beer sector has grown by 21% since 2010 and contributed to almost all the growth observed, driven by its two largest GI "Münchener Bier PGI" and "Bayerisches Bier PGI" and to a lesser extent by "Kulmbacher Bier PGI".
- In Czechia, the sales value of the sector remained stable over the period. Since the registration of "České Pivo PGI", the beer industry has widely implemented this standard into its production units.

Table 17 - Sales value of beers under GIs and TSGs in by MS the EU (million EUR)

Beers	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Germany	2 228	2 178	2 327	2 418	2 400	2 501	2 196	2 482	2 645	79%	21%	92%
Czechia	72	680	644	660	682	668	656	663	680	20%	0%	0%
Other MSs	2	2	35	35	36	37	39	40	42	1%	2459%	8%
Total	2 301	2 859	3 007	3 114	3 119	3 208	2 892	3 186	3 368	100%	18%	100%

Source: AND-International study for DG AGRI

In Germany, beer under GIs represented 47%²⁸ of national production in 2017. This share was stable over the period with an annual growth rate of +0.7%/year (in comparison with -0.1% for the beer industry).

In Czechia, beer covered by GIs represented 66%²⁹ of national production in 2017. This share has remained stable over the period with a zero annual growth rate compare to +0.8%/year for the national beer sector.

F.1.1.6 Fresh meats (and offal)

In 2017, the sales volume of fresh meats covered by a GI/TSG reached 483 084 t and the sales value was EUR 2.99 billion for a total of 162 registered GIs/TSGs (including 2 TSGs). The fresh meat sales value has almost doubled (98%) since 2010 and PGI products contributed entirely to this growth.

Table 18 - Sales value of fresh meat under GIs and TSGs in the EU (million EUR)

Fresh meats	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010 (TSG evol. 2017/2011)	% of growth
PDO	24	25	26	27	28	42	48	42	46	2%	84%	1%
PGI	1 295	1 490	1 619	2 043	2 147	2 195	2 610	2 940	2 934	98%	97%	98%
TSG	0	0	13	14	14	14	16	14	13	0%	-1%	1%
GI (PDO + PGI)	1 319	1 515	1 646	2 070	2 175	2 237	2 658	2 982	2 980	100%	81%	100%
Total	1 319	1 515	1 659	2 084	2 189	2 251	2 674	2 996	2 993	100%	98%	100%

Source: AND-International study for DG AGRI

Among the 15 MSs currently producing fresh meat and offal under GIs, the UK and France accounted for 81% of the total sales value in 2017.

²⁸ Estimate elaborated by AND-I based on Eurostat/Prodcom data

²⁹ Estimate elaborated by AND-I based on Eurostat/Prodcom data

- The UK represented more than half of the sales value and 62% of the contribution to the growth. The largest British fresh meat GI is the “West Country Beef PGI”.
- France accounted for 25% of the sales value and 14% of the contribution to the growth. The largest French fresh meat GIs are “Canard à foie-gras du Sud-Ouest PGI” and « Volailles de Loué PGI ».

Table 19 – Sales value of fresh meat under GIs by MS in the EU (million EUR)

Fresh meats	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
United Kingdom	597	759	818	875	904	955	1 353	1 479	1 670	56%	120%	62%
France	499	533	624	678	720	740	762	750	742	25%	39%	14%
Germany	4	6	8	238	240	241	241	244	247	8%	4335%	16%
Spain	137	163	131	198	214	202	203	412	220	7%	35%	4%
Other MSs	81	54	65	81	97	99	99	99	101	3%	87%	3%
Total	1 319	1 515	1 646	2 070	2 175	2 237	2 658	2 982	2 980	100%	97%	100%

Source: AND-International study for DG AGRI

The three largest fresh meat categories produced under GI/TSG accounted for 98% of the total sales value in 2017:

- Bovine fresh meat is the leading subcategory in terms of weight (60% of the total sales value), and of growth contribution, contributing more than two thirds of the growth in the fresh meat sector.
- Poultry and Lamb fresh meat accounted for, respectively, 20% and 18% of the total sales value and 14% and 19% % of the growth.

Table 20 - Sales value under GIs in 2017 per subcategory of fresh meat in the EU (million EUR)

Fresh meats	2005	2010	2011	2012	2013	2015	2016	2017	%	Evol. 2017/2010	% of growth
Bovines	662	839	827	1 088	1 082	1 497	1 653	1 804	61%	115%	69%
Poultry	363	424	505	546	575	616	595	592	20%	40%	14%
Lambs	225	231	289	402	480	510	695	538	18%	133%	19%
Pigs, goat and other fresh meat	68	21	25	34	39	36	39	46	2%	123%	-1%
Total	1 319	1 515	1 646	2 070	2 175	2 658	2 982	2 980	100%	97%	100%

Source: AND-International study for DG AGRI

Regarding the national sector, British fresh meats covered by GIs grew from 9% in 2010 to 16%³⁰ of the national production in 2017. The GI fresh meat sales value has grown faster (+11.9%/year) than the general sector (+3.3%/year).

In France, the GIs fresh meat accounted for 5%³¹ of the national production in 2017. The annual growth is more important for GIs fresh meat products (+4.9%/year) than for the national fresh meat sector (+2.1%/year).

The German fresh meat sector covered by GIs represented 14% of the national production in 2017. GIs fresh meat products sales grew faster (+71.9%/year) than the national fresh meat sector (+1.4%).

³⁰ Estimate elaborated by AND-I based on Eurostat/SBS data

³¹ Estimate elaborated by AND-I based on Eurostat/SBS data

F.1.1.7 Fruits and vegetables and cereals

In 2017, the sales volume of fruits and vegetables and cereals covered by a GIs reached 2 014 025 t and the sales value was EUR 1.94 billion for a total of 360 registered GIs. This category sales value has almost doubled (+97%) since 2010 and PGI products are mostly responsible of this growth (87%).

Table 21 – Sales value of fruits and vegetables and cereals under GIs in the EU (million EUR)

Fruits and vegetables and cereals	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
PDO	494	558	530	591	610	599	589	601	678	35%	21%	13%
PGI	278	427	544	751	779	1 004	1 070	1 305	1 262	65%	195%	87%
Total	771	986	1 075	1 343	1 389	1 603	1 658	1 907	1 940	100%	97%	100%

Source: AND-International study for DG AGRI

Among the 21 MSs currently producing fruits and vegetables and cereals under GIs, four of them accounted for 75% of the total sales value in 2017:

- Spain represented 31% of the sales value and contributed to nearly half of the growth. The fruit sector benefitted from the registration in 2015 of "Plátano de Canarias PGI" which became the largest Spanish fruit and vegetable GI in 2017 and also the "Granada de Molla de Elche/Granada de Elche PGI".
- France accounted for 16% of the sales value and contributed to 13% of the growth. The largest French fruit GIs are « Pruneaux d'Agen PGI », « Noix de Grenoble PDO » and « Clémentine de Corse PGI ».
- Italy represented 15% of the sales value but contributed negatively to the growth of the sector. The production of its two largest fruits GIs "Mela Alto Adige/Südtiroler Apfel PGI" and "Mela Val di Non PDO" dropped two years in a row because of poor climatic conditions. Therefore, the sales value decreased over the years 2016 and 2017.
- Germany accounted for 13% of the sales value and contributed to 22% of the growth, thanks to the registration of five new GIs: "Schrobenhausener Spargel PGI"³², "Dithmarscher Kohl PGI", "Spargel aus Franken PGI"³³, "Fränkischer Grünkern PGI" and "Abensberger Spargel/Abensberger Qualitätsspargel PGI".

Table 22 – Sales value of fruits and vegetables and cereals under GIs by MS, in the EU (million EUR)

Fruits and vegetables and cereals	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Spain	146	159	171	155	194	271	275	542	595	31%	275%	46%
France	154	192	206	232	237	256	285	315	313	16%	63%	13%
Italy	179	320	393	471	434	474	414	316	289	15%	-10%	-3%
Germany	33	46	87	93	107	165	215	241	253	13%	445%	22%
UK	187	163	105	114	136	145	172	152	148	8%	-9%	-2%
Portugal	31	40	29	90	80	74	57	81	112	6%	181%	8%
Other MSs	41	65	83	189	202	219	240	261	230	12%	252%	17%
Total	771	986	1 075	1 343	1 389	1 603	1 658	1 907	1 940	100%	97%	100%

Source: AND-International study for DG AGRI

³² Where "Schrobenhausener Spargel" is mentioned, the name refers to "Schrobenhausener Spargel/Spargel aus dem Schrobenhausener Land/Spargel aus dem Anbaugebiet Schrobenhausen".

³³ Where "Spargel aus Franken" is mentioned, the name refers to "Spargel aus Franken/Fränkischer Spargel/Franken-Spargel".

In 2017, the two largest subcategories were as follows:

- Fruits GIs accounted for two thirds of the total sales value and for two thirds of the growth. This growth has benefitted from the registration of Spanish GIs and to a lesser extent the increase in production of some GIs such as "Melocotón de Calanda PGI" and "Jabłka grójeckie PGI".
- Vegetable GIs accounted for 32% of the total sales value and contributed to 29% of the growth. The German GIs mentioned above contributed to the growth of the vegetable sector.

The table olives and cereals subcategories made up 4% of the sales value and contributed to 4% of the growth.

Table 23 – Sales value under GI per subcategory of fruits and vegetables and cereals in the EU (million EUR)

Subcategory	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Fruits	413	614	729	870	895	1 050	1 036	1 234	1 246	64%	103%	66%
Vegetables	342	335	309	396	433	504	566	600	613	32%	83%	29%
Cereals	9	31	32	69	48	38	43	56	63	3%	103%	3%
Table olives	7	5	5	7	13	11	14	16	18	1%	273%	1%
Total	771	986	1 075	1 343	1 389	1 603	1 658	1 907	1 940	100%	97%	100%

Source: AND-International study for DG AGRI

In Spain, the GI fruits and vegetables share grew from 1% in 2010 to 4%³⁴ of the national production in 2017. The GI fruit and vegetable sales value has evolved faster (+20.7%/year) than the general sector (+3.8%/year).

French GI fruits and vegetables represented 4%³⁵ of the national fruit and vegetable production in 2017. The annual growth rate for GI fruits and vegetables is more important than the national fruits and vegetables growth rate (+7.2%/year versus +1%/year) over the 2010-2017 period.

In Italy, the share of fruits and vegetables covered by GIs dropped to 2%³⁶ in 2017 due to the fall of the apple fruit production in the Alps. The annual growth rate for GIs was negative (-1.4 %/year) while the non-GI sector grew by +1%/year.

F.1.1.8 Fish, molluscs and crustaceans

In 2017, the sales volume of fish, molluscs and crustaceans was estimated to reach 246 709 t and the sales value was EUR 1.42 million for a total of 43 registered GIs/TSGs (including 3 TSGs). This category more than tripled (+221%) in terms of sales value since 2010 and PGI products contributed to 60% of this growth followed by TSGs products (32% of growth).

Table 24 - Sales value of fish, molluscs and crustaceans under GIs/TSGs in the EU (million EUR)

Fish, molluscs and crustaceans	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
PDO	1	15	45	65	97	98	99	98	97	7%	542%	8%
PGI	528	428	592	625	678	784	802	885	1 013	71%	136%	60%
TSG	0	0	0	0	0	31	60	305	312	22%	/	32%
GI (PDO + PGI)	528	443	637	691	775	881	901	983	1 109	100%	74%	100%
Total	528	443	637	691	775	913	962	1 288	1 421	100%	221%	100%

Source: AND-International study for DG AGRI

³⁴ Estimate elaborated by AND-I based on Eurostat/SBS data

³⁵ Estimate elaborated by AND-I based on Eurostat/SBS data

³⁶ Estimate elaborated by AND-I based on Eurostat/SBS data

Among the 14 MSs producing fish, molluscs and crustaceans under GIs, the UK and France accounted for 88% of the total sales value in 2017:

- The UK is the largest MS for fish, molluscs and crustacean's production covered by GIs. The GIs' seafood sector almost tripled from 2010 (+193%) and contributed the most to the growth of the EU (85%). The sector is driven by the "Scottish farmed Salmon PGI," which is the largest seafood GI.
- France GI's seafood sector grew by 35% from 2010 and contributed to 5% of the growth over the 2010-2017 period. The largest French seafood GI was "Huîtres Marennes Oléron PGI".

Fish products were the largest subcategory of fish and molluscs produced under GIs and accounted for 81% of the total sales value in 2019 and 93% of the growth.

Table 25 - Sales value under GI per subcategory of fish and molluscs in the EU (million EUR)

Subcategory	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Fish	528	343	520	559	613	717	752	834	963	81%	181%	93%
Molluscs	0	100	117	132	161	164	150	149	146	19%	45%	7%
Total	528	443	637	691	775	881	901	983	1 109	100%	150%	100%

Source: AND-International study for DG AGRI

F.1.1.9 Oils and fat products

In 2017, the sales volume of oils and fat products reached 115 684 t and the sales value was EUR 555 million for a total of 134 registered GIs/TSGs (including 1 TSG). This category has increased by 59% in terms of sales value since 2010 and PDO products contributed to 80% of this growth.

Table 26 - Sales value of oils and fat products under GIs in the EU (million EUR)

Oils and fats	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
PDO	313	304	382	390	354	433	449	455	470	85%	55%	80%
PGI	46	44	46	47	64	62	73	82	85	15%	93%	20%
Total	359	348	428	437	417	494	522	537	555	100%	59%	100%

Source: AND-International study for DG AGRI

Among the 11 MSs producing oils and fats under GIs, 4 of them accounted for 74% of the total sales value in 2017:

- France represented 35% of the value and contributed to 30% of the sector growth. Butter GIs are the leading oils and fat products for France. The largest GIs were "Beurre Charentes-Poitou / Beurre des Charentes / Beurre des Deux-Sèvres PDO" and "Beurre d'Isigny PDO".
- Spain represented 25% of the sales value and one third of the growth contribution. The three largest olive oil GIs are "Baena PDO", "Siurana PDO", and "Sierra de Cazorla PDO".
- Italy which accounted for 14% of the value but contributed to 2% of the growth. The leading olive oils were "Terra di Bari PDO", "Toscano PGI" and "Val di Mazara PGI".

Table 27 - Sales value of oils and fat products under GIs by MS in the EU (million EUR)

Oils and fats	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
France	136	132	173	159	145	175	170	172	193	35%	46%	30%
Spain	90	72	275	101	106	132	138	136	141	25%	94%	33%
Italy	61	73	84	82	65	62	74	74	76	14%	5%	2%
Greece	38	42	31	34	40	41	61	74	54	10%	28%	6%
Other MSs	35	29	52	60	61	84	78	81	91	16%	212%	30%
Total	359	348	616	437	417	494	522	537	555	100%	59%	100%

Source: AND-International study for DG AGRI

Olive oils are the largest subcategory of oils and fat products under GIs accounting for 54% of the 2017 sales value and half of the growth. Butter products represented 35% of the sales value and one quarter of the growth. The share of other edible oils reached 11% of the sales value in 2017 but contributed to a larger extent to the growth of the sector with 26%.

Table 28 - Sales value under GIs per subcategory of oils and fat products in the EU (million EUR)

Subcategory	2005	2010	2011	2012	2013	2015	2016	2017	%	Evol. 2017/2010	% of growth
Olive oil	204	203	230	256	230	297	302	301	54%	48%	50%
Butter	145	134	183	161	153	174	179	192	35%	44%	24%
Other edible oils	10	11	15	20	35	51	56	62	11%	466%	26%
Total	359	348	428	437	418	523	537	555	100%	60%	100%

Source: AND-International study for DG AGRI

F.1.1.10 Other products

The sales volume of other products covered by GIs/TSGs has been estimated at 1 080 052 t for a total sales value of EUR 2.56 billion. There are 218 GIs/TSGs including 21 TSGs. This category has grown by 168% in terms of sales value since 2010. PGI and TSG products contributed to all of the growth observed while PDO products declined by 3%. This category gathers a diverse range of agricultural products and foodstuffs:

- bread, pastry, cakes, confectionary, biscuits and other baker's wares;
- essential oils;
- cochineal;
- hay;
- mustard paste;
- natural gums and resins;
- other products of animal origin (eggs, honey, various dairy products except butter, etc.);
- other products of the Annex I of the Treaty (spices, etc.);
- pasta;
- salt;
- wool.

Table 29 - Sales value of other products under GIs by product designation in the EU (million EUR)

Other products	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
PDO	260	287	147	158	166	198	185	231	233	9%	-19%	-3%
PGI and TSG	355	667	1 199	1 385	1 344	1 574	1 920	1 823	2 328	91%	249%	103%
Total	616	954	1 346	1 544	1 510	1 771	2 106	2 053	2 562	100%	168%	100%

Source: AND-International study for DG AGRI

Among the 24 MSs producing other agri-food products covered by GIs, 3 of them accounted for 81% of the total sales value in 2017:

- Germany represented 43% of the value and contributed to half of the growth over the 2010-2016 period. The leading German GIs for other products were "Hopfen aus der Hallertau PGI" registered in 2010 and "Schwäbische Maultaschen/ Schwäbische Suppenmaultaschen PGI" registered in 2009.
- Italy accounted for 26% of the sales value in 2017 and contributed to one quarter of the growth. The leading Italian GI for other products was "Aceto Balsamico di Modena PGI".
- France represented 12% of the sales value and 6% of the growth. There are no specific leading French GIs for other products.

Table 30: Sales value of other products under GIs by MS in the EU (million EUR)

Other products	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2010	% of growth
Germany	314	322	626	614	688	770	747	857	889	43%	176%	50%
Italy	6	249	270	404	269	384	490	518	553	26%	122%	27%
France	108	184	201	205	214	217	231	239	247	12%	34%	6%
Spain	128	88	116	114	123	155	375	148	172	8%	95%	7%
United Kingdom	25	23	20	100	98	104	114	104	99	5%	338%	7%
Czechia	0	58	54	44	51	60	49	71	65	3%	12%	1%
Other MS ³⁷	35	30	37	40	42	43	61	68	67	3%	119%	3%
Total	616	954	1 324	1 520	1 485	1 734	2 066	2 005	2 091	100%	119%	100%

Source: AND-International study for DG AGRI

F.1.2 TSG products

The total sales value of TSG agricultural products and foodstuffs reached EUR 2.39 billion in 2017 for 54 products and for a total volume of 879 431 t. Five TSGs gathered almost 80% of the total sales value: "Jamon Serrano", "Heumilch / Haymilk / Latte fieno / Lait de foin / Leche de heno", "Hollandse maatjesharing/ Hollandse Nieuwe/Holländischer Matjes", "Kiełbasa jałowcowa staropolska" and "Falukorv". TSG agrifood products increased by 50% from 2011.

Table 31: Sales value of TSG product in the EU (million EUR)

TSG	2011	2012	2013	2014	2015	2016	2017	Evol. 2017/2011
Total³⁸	1 588	2 009	2 216	1 758	1 312	1 902	2 389	50%

Source: AND-International study for DG AGRI

³⁷ The other MSs category includes Greece, Sweden, Bulgaria, Poland, Portugal, Belgium, Slovakia, Austria, Ireland, Cyprus, Slovenia, Hungary, Finland, Lithuania, Croatia and Luxembourg.

³⁸ Regarding statistical secret rules, no data could be published by MS nor by category of products.

Among the 17 MSs producing agricultural products and foodstuffs under TSGs, Spain and Poland accounts for 58% of the sales value in 2017. While Spanish production decreased by 26% since 2011, the Polish production of TSG products grew from EUR 10 million to EUR 390 million. These two countries represented 58% of the sales value in 2017 and contributed to 3% of the growth.

The Netherlands, Sweden and France accounted for 20% of the production and contributed to 39% of the growth. The TSGs that contributed the most to this growth were "Hollandse maatjesharing", "Moules de Bouchot" and "Falukorv".

The other 12 MSs represent 22% of the sales value and 58% of the growth. The registration of "Heumilch / Haymilk / Latte fieno / Lait de foin / Leche de heno" in 2015 represented a large part of the growth.

Table 32 - Sales value of agri-food products under TSGs in EU by category of products in the EU (million EUR)

TSG	2011	2012	2013	2014	2015	2016	2017	%	Evol. 2017/2011	% of growth
Meat products	1 484	1 900	2 106	1 602	1 123	1 457	1 514	63%	2%	4%
Other products of animal origin	6	7	8	9	10	13	440	18%	7240%	54%
Cheeses	35	36	37	35	34	39	38	2%	9%	0%
Bread, pastry, cakes, etc	2	2	2	14	15	15	15	1%	808%	2%
Fresh meats (and offal)	13	14	14	14	16	14	13	1%	-1%	0%
Prepared meals	6	6	6	7	7	12	7	0%	29%	0%
Oils and fats	1	1	1	1	1	0	0	0%	-3%	0%
Other products	42	42	43	76	106	352	361	15%	760%	40%
Total	1 588	2 009	2 216	1 758	1 312	1 902	2 389	100%	50%	100%

Source: AND-International study for DG AGRI

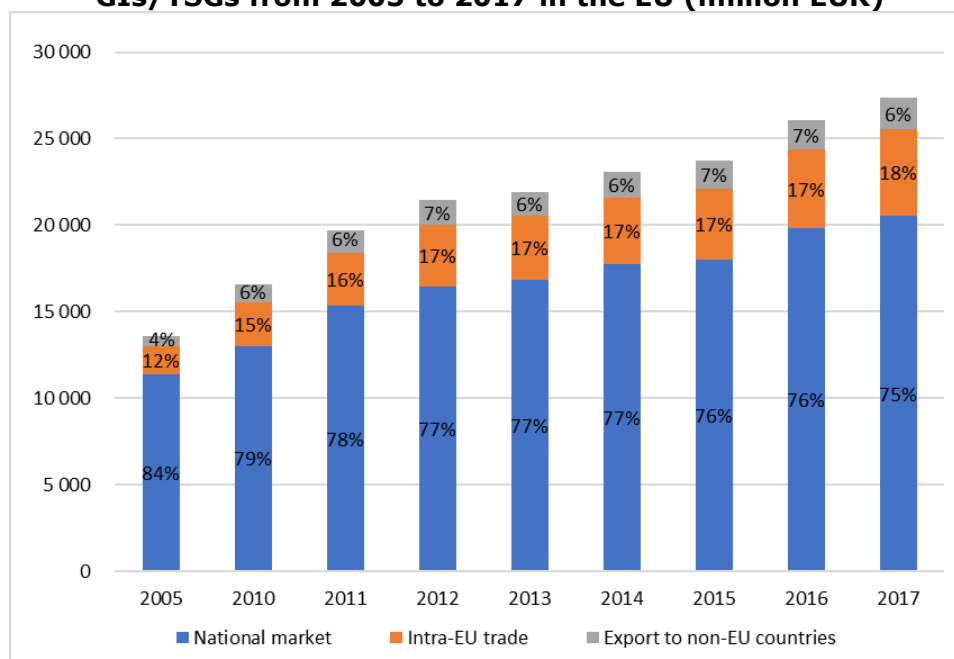
F.1.3 Intra-EU trade and exports to non-EU countries

F.1.3.1 General overview

The national market remains the largest market for agricultural products and foodstuffs covered by GIs and TSGs representing 75% of the value and volume in 2017. However, the share of the national market decreased progressively as the shares of intra-EU trade and exports to non-EU countries grew both in value and in percentage.

Intra-EU trade is the second market for GI/TSG products and represented 19% of the value share while exports to non-EU countries represented 6% of the total market.

Figure 11 - Evolution of sales destination for agri-food products covered by GIs/TSGs from 2005 to 2017 in the EU (million EUR)



Source: AND-International study for DG AGRI

F.1.3.2 Intra-EU trade

The total intra-EU sales volume of agricultural products and foodstuffs covered by GIs and TSGs reached EUR 5.04 billion in 2017 and almost doubled from 2010. PGI agri-food products represented half of the intra-EU sales and more than half of the growth. PDO products represented 39% of the total intra-EU sales and represented 19% of the growth.

Table 33: Intra-EU sales of agri-food products under GIs/TSGs in EU (million EUR)

Agri-food Intra-EU trade	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evolution 2017/2010 (TSG evol 2017/2011)	% of growth
PDO	854	1 495	1 570	1 626	1 601	1 689	1 777	1 858	1 969	39%	32%	19%
PGI	768	1 031	1 289	1 621	1 711	1 922	2 144	2 330	2 478	49%	140%	57%
TSG	0	0	208	331	362	254	161	363	596	12%	186%	24%
GI (PDO + PGI)	1 622	2 526	2 860	3 247	3 312	3 611	3 921	4 188	4 448	88%	56%	80%
Total	1 622	2 526	3 068	3 578	3 674	3 865	4 082	4 551	5 044	100%	100%	100%

Source: AND-International study for DG AGRI

The three largest agri-food products covered by GIs traded in the EU accounted for 71% of the total intra-EU sales value in 2017 and 73% of the growth:

- Cheeses represented half of the total intra-EU sales in 2017 and half of the growth between 2010 and 2017.
- Fresh meat products accounted for 12% of the total intra-EU sales in 2017 and contributed to 18% of the growth.
- Meat products represented 11% of the total intra-EU sales in 2017 and contributed to 4% of the growth.

Table 34: Intra-EU sales of agri-food products under GIs (TSG excl.) by category of products in the EU (million EUR)

Agri-food Intra-EU trade	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol 2017/2010	% of growth
Cheeses	1 165	1 340	1 491	1 535	1 707	1 879	1 997	2 143	48%	84%	51%
Fresh meats (and offal)	183	173	251	281	285	333	401	520	12%	184%	18%
Meat products	427	405	393	401	432	497	550	507	11%	19%	4%
Beers	288	277	283	282	289	303	313	331	7%	15%	2%
Fresh fish, molluscs, and crustaceans	118	130	198	206	235	244	254	288	6%	143%	9%
Other products of Annex I	116	221	275	221	244	254	288	285	6%	146%	9%
Fruit, vegetables and cereals	160	222	261	274	298	267	237	220	5%	37%	3%
Oils and fats	49	69	71	76	83	87	93	94	2%	90%	2%
Other products	19	23	24	35	37	56	55	60	1%	220%	2%
Total	2 526	2 860	3 247	3 312	3 611	3 921	4 188	4 448	100%	76.1%	100%

Source: AND-International study for DG AGRI

Among the 26 MSs currently trading agri-food products under GI within the EU, the 3 largest MS represented 64% of the intra-EU sales value in 2017 and 69% of the growth:

- Italy represented one third of the total intra-EU sales in 2017 and 12% of the growth between 2010 and 2017. The largest agri-food GIs traded in EU are "Mela Alto Adige/Südtiroler Apfel PDO", "Grana Padano PDO" and "Aceto Balsamico di Modena PGI".
- The UK represented 17% of the total intra-EU sales in 2017 and 26% of the growth. The largest British GIs traded within the EU are "Scottish Farmed Salmon PGI" and "Welsh lamb PGI".
- The Netherlands represented 14% of the total intra-EU sales in 2017 and 32% of the growth between 2010 and 2017. The largest Dutch agri-food exports were "Gouda Holland PGI" and "Noord-Hollandse Gouda PDO".

Table 35: Intra-EU sales of agri-food products under GIs (TSG excl.) by MS in the EU (million EUR)

Agri-food Intra-EU trade	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol 2017/2010	% of growth
Italy	1 226	1 341	1 427	1 279	1 331	1 387	1 398	1 450	33%	18%	12%
United Kingdom	246	240	373	421	454	505	591	750	17%	204%	26%
Netherlands	26	97	202	285	402	496	565	631	14%	2365%	32%
Germany	246	393	391	401	444	479	547	505	11%	106%	14%
Greece	187	193	204	231	253	302	330	339	8%	81%	8%
France	187	193	208	199	211	218	227	225	5%	20%	2%
Czechia	143	130	131	137	145	155	164	173	4%	21%	2%
Spain	87	108	124	149	151	161	130	129	3%	47%	2%
Other MSs	178	164	186	212	218	217	234	246	6%	38%	4%
Total EU 28	2 526	2 860	3 247	3 312	3 611	3 921	4 188	4 448	100%	76%	100%

Source: AND-International study for DG AGRI

F.1.3.3 Exports to non-EU countries

The total volume of exports to non-EU countries of agricultural products and foodstuffs covered by GIs and TSGs reached EUR 1.77 billion in 2017 and grew by 70% since 2010. PGI agri-food products represented half of the exports to non-EU countries and two thirds of the growth. PDO products represented 45% of the total exports to non-EU countries and 22% of the growth.

Table 36: Extra-EU sales of agri-food products under GIs/TSGs in the EU (million EUR)

Agri-food Extra-EU trade	2005	2010	2011	2012	2013	2014	2015	2016	2017	%	Evolution 2017/2010 (TSG evol 2017/2011)	% of growth
PDO	400	632	635	666	671	687	730	757	796	45%	26%	22%
PGI	171	406	578	639	625	710	818	882	886	50%	118%	66%
TSG	0	0	50	91	97	77	61	77	85	5%	69%	12%
GI (PDO + PGI)	571	1 038	1 213	1 305	1 296	1 397	1 548	1 639	1 682	33%	39%	93%
Total	571	1 038	1 264	1 396	1 394	1 474	1 609	1 716	1 767	100%	70%	100%

Source: AND-International study for DG AGRI

The three largest agri-food products covered by GIs and exported to non-EU countries accounted for 70% of the total extra-EU sales value in 2017 and 65% of the growth:

- Cheeses represented 44% of the total exports to non-EU countries in 2017 and 40% of the growth between 2010 and 2017.
- Other products of Annex I accounted for 15% of the total exports to non-EU countries in 2017 and contributed to 20% of the growth.
- Meat products represented 10% of the total exports to non-EU countries in 2017 and contributed to 5% of the growth.

In addition, beers and fresh fish and molluscs and crustaceans made up 18% of the total exports to non-EU countries and contributed to 19% of the growth.

Table 37: Exports to non-EU countries of agri-food products under GIs (TSG excl.) in the EU (million EUR)

Agri-food exports to non-EU countries	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol 2017/2010	% of growth
Cheeses	482	506	572	569	620	674	697	740	44%	53%	40%
Other products of Annex I	128	184	222	177	204	206	260	259	15%	103%	20%
Meat products	146	157	140	138	148	167	190	176	10%	20%	5%
Beers	101	103	125	131	143	164	176	171	10%	69%	11%
Fresh fish, molluscs, and crustaceans	82	119	70	69	78	94	115	136	8%	65%	8%
Fruits, vegetables and cereals	45	79	97	124	117	100	83	86	5%	90%	6%
Oils and fats	32	36	41	41	39	58	57	52	3%	63%	3%
Fresh meats (and offal)	6	13	18	20	21	21	22	23	1%	296%	3%
Other products	16	16	19	26	28	64	38	40	2%	147%	4%
Total	1 038	1 213	1 305	1 296	1 397	1 548	1 639	1 682	100%	62.0%	100%

Source: AND-International study for DG AGRI

Among the 26 MSs currently trading agri-food products under GI outside EU, the 3 largest represented 71% of the value of exports to non-EU countries value in 2017 and 56% of the growth:

- Italy represented 42% of the total exports to non-EU countries in 2017 and 12% of the growth between 2010 and 2017. The largest Italian agri-food GIs sold outside EU are "Mela Alto Adige/Südtiroler Apfel PDO", "Grana Padano PDO" and "Aceto Balsamico di Modena PGI".
- Germany represented 19% of the total exports to non-EU countries in 2017 and 33% of the growth. German GIs beers are the largest GIs traded outside EU: "Bayerisches Bier PGI", "Münchener Bier PGI" and "Kulmbacher Bier PGI".

- The UK represented 10% of the total exports to non-EU countries in 2017 and 12% of the growth between 2010 and 2017. "Scottish Farmed Salmon PGI" and "Welsh lamb PGI" were the largest British agri-food GIs exported.

Table 38: Exports to non-EU countries of agri-food products under GIs (TSG excl.) by MS in the EU (million EUR)

Agri-food exports to non-EU countries	2010	2011	2012	2013	2014	2015	2016	2017	%	Evol 2017/2010	% of growth
Italy	627	644	708	620	654	699	674	702	42%	12%	12%
Germany	112	199	220	223	261	290	354	322	19%	187%	33%
United Kingdom	94	135	93	86	110	127	150	173	10%	84%	12%
Netherlands	0	15	33	49	72	90	113	124	7%	652510%	19%
Spain	50	54	66	113	87	134	108	116	7%	134%	10%
Greece	40	42	50	50	58	68	73	70	4%	74%	5%
Czechia	53	46	42	49	52	41	57	58	3%	10%	1%
France	25	30	35	38	40	41	43	43	3%	77%	3%
Other MSs	39	48	57	68	63	58	67	74	4%	92%	6%
Total EU 28	1 038	1 213	1 305	1 296	1 397	1 548	1 639	1 682	100%	62%	100%

Source: AND-International study for DG AGRI

F.2 Wines

F.2.1 World context for the wine sector

The wine sector faced great changes over the last decades. Historically, the main countries for wine production and consumption are France, Italy and Spain. However, new producers and markets have emerged since the 2000s, both in EU and non-EU countries. This section provides an overview of these evolutions since 2005, based on data from the International Organization of Vine and Wine (OIV) and DG AGRI.

Surfaces

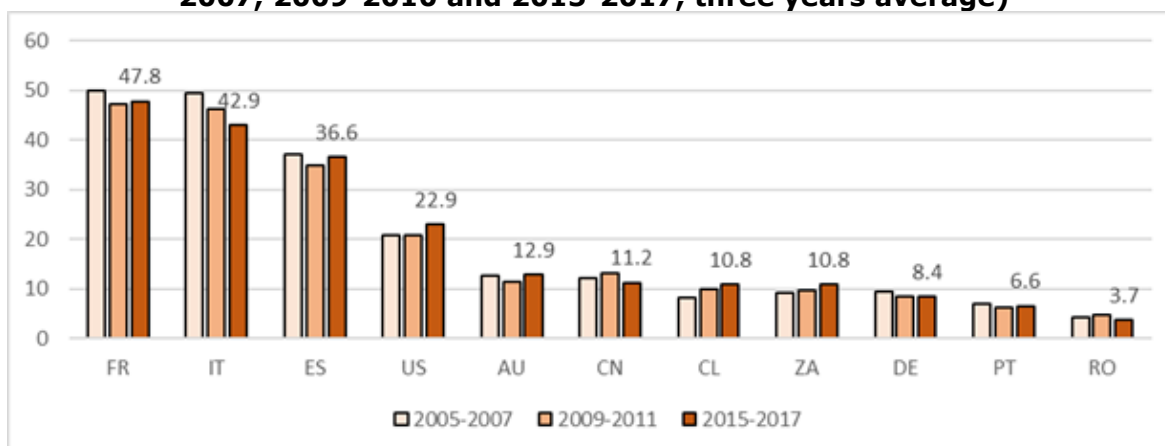
World surface for wine was 7.5 million ha in 2017 (source: OIV). The EU28 accounted for 42.6 % of this surface (Spain, France and Italy having 75 % of EU28 surfaces). The world grape surface has increased by 3 % since 2005, while surfaces in the top three EU countries have decreased (-12 %).

Production

The world production of wine was 264 Mhl in 2015–2017 (three-year average) but is on a decreasing trend (-4 % compared to 2005–2007 and -1 % compared to 2009–2011; source: OIV data). The EU28 accounts for 62 % of world production (with an average of 163.6 Mhl for 2014/2015–2016/2017, based on DG AGRI data). Based on OIV data, the top three countries at world level are EU28 MSs: France, Italy and Spain. They accounted for almost half of global wine production in 2015–2017 (48 %) and 78 % of EU28 wine production. The following five wine producers are non-EU countries: the US (22.9 Mhl), Australia (12.9 Mhl), China (11.2 Mhl), Chile (10.8 Mhl), South Africa (10.8 Mhl); followed by Germany (8.4 Mhl), Portugal (6.6 Mhl) and Romania (3.7 Mhl). We note that each of the two main producing regions in the EU28 (at NUTS 3 level, namely Castilla-La-Mancha in Spain and Languedoc-Roussillon in France) produce as much, or even more, than most of the non-EU countries (20.3 Mhl of wine was produced in Castilla-La Mancha in 2016/2017³⁹ and 11.9 Mhl of wine was produced in Languedoc-Roussillon (average for 2015–2017; source: FranceAgriMer).

³⁹ Source : Plan Estratégico del Sector Vitivinícola de Castilla-La Mancha, February 2019, https://www.castillalamancha.es/sites/default/files/documentos/pdf/20190312/plan_estrategico_sector_vitivinicola_de_castilla-la_mancha.pdf

Figure 12 - Main wine producers at world level (evolution between 2005-2007, 2009-2010 and 2015-2017, three years average)



Source: based on OIV data

Consumption

World wine consumption remained relatively stable with a 3 % increase between 2005 and 2017 (it peaked at 251 Mhl in 2017; source: OIV). However, we observe a decrease in consumption in the EU MSs with a historical high level of consumption and an increase of consumption in other countries. As illustration, France was the first market for wine in 2005 with 33.5 Mhl and ranked second after the US in 2017 with 27 Mhl (-19 %). We observe similar trends in Italy and Spain. However, the level of consumption remains high in these MSs, with 51.2 l/capita in 2016 in France, 43.6 l/capita in Italy and 26.5 l/capita in Spain. Over the same period, consumption in the US increased by 13 %, and this is the first market for wine in 2017, with consumption of 32.6 Mhl. There was an increase in consumption of 46 % in China, with 17.9 Mhl consumed in 2017. The level of per capita consumption remains low in these countries compared to France, Italy and even Spain, the UK and Germany (12.2 l/capita in the US and 1.7 l/capita in China). Detailed data are provided in Table 39.

Table 39 - Evolution of the wine consumption between 2005 and 2017 at world level and in the main countries

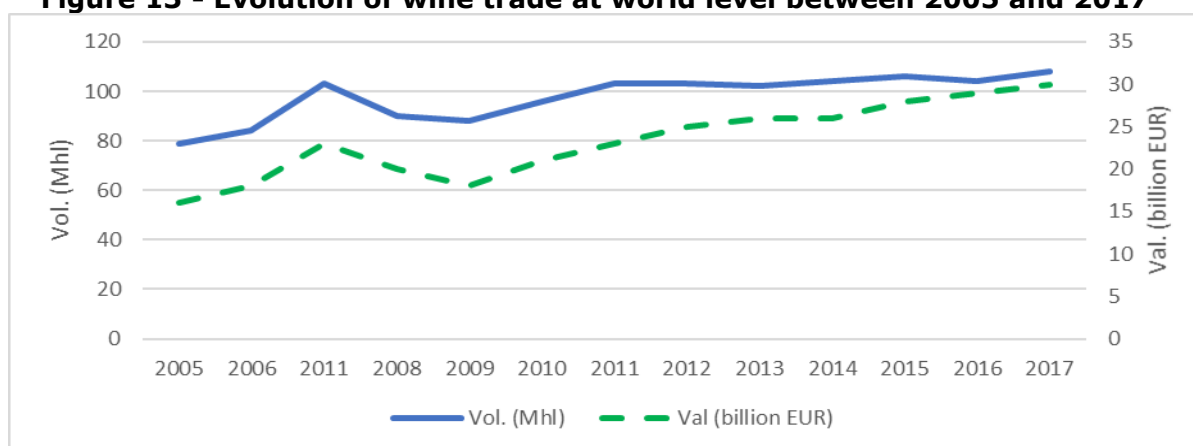
	Wine consumption (Mhl)					Per capita consumption (l/capita) - 2016
	2005	2010	2017	% of world consumption	Evol. 2017/2005	
World	238.8	241.9	244.0	100%	+3%	/
Total top 7 countries	148.4	139.3	143.4	59%	-3%	/
US	28.9	27.3	32.6	13%	+13%	12.2
FR	33.5	29.3	27.0	11%	-19%	51.2
IT	27.0	23.5	22.6	9%	-16%	43.6
DE	19.9	20.2	20.1	8%	+1%	28.4
CN	12.3	15.2	17.9	7%	+46%	1.7
UK	13.1	12.9	12.7	5%	-3%	23.8
ES	13.7	10.9	10.5	4%	-23%	26.5

Source: based on OIV data

Trade

As a consequence of the large changes in both production and consumption at world level, trade has increased strongly over the last decades, both in volume and value. In 2017, the global trade for wine reached 108 Mhl in volume (+13 % since 2010 and +37 % since 2005) and was at EUR 30 billion (+43 % since 2010 and +88 % since 2005). The largest increase for value compared to volume shows an increase of unit prices for wines on the international market. Detailed data are provided in Figure 13.

Figure 13 - Evolution of wine trade at world level between 2005 and 2017



Source: based on OIV data

In 2017, the main exporters in the world were France, Italy and Spain, followed by non-EU countries (Chile, Australia, the US and New Zealand) and Germany. Each of these countries exported at least EUR 1 billion in 2017. Main importers were the US, the UK, Germany, China, Canada, Japan and the Netherlands (at least EUR 1 billion imported in 2017). France was the leading exporter in terms of value (EUR 9 billion), but was third in volume after Spain and Italy, which shows the positioning on premium wines for France compared to other exporters.

Table 40 - Top exporters and importers of wine in 2017 at world level (volume and value)

	Export 2017			Import 2017	
	Volume (Mhl)	Value (bn EUR)		Volume (Mhl)	Value (bn EUR)
FR	14.9	9.0	US	11.8	5.2
IT	21.4	5.9	UK	13.2	3.5
ES	23.2	2.6	DE	15.2	2.5
CL	9.8	1.7	CN	7.5	2.5
AU	7.8	1.7	CA	3.1	1.7
US	3.3	1.3	JP	2.6	1.4
NZ	2.5	1.1	NL	4.4	1.2
DE	3.8	1.0	RU	4.5	0.9
PT	3.0	0.8	FR	7.6	0.7
ZA	4.5	0.6	SE	2.2	0.6

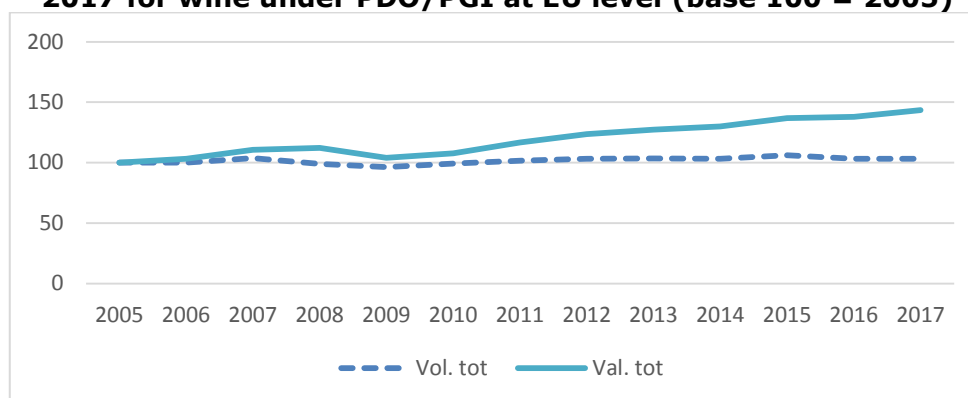
Source: based on OIV data

F.2.2 Overview at EU level

Sales volume and value at EU level

The sales value of wine under GI at EU level in 2017 was EUR 39.4 billion (+33% since 2010 and +43% since 2005). The sales volume grew to a lesser extent (+4% since 2010 and +3% since 2005) and reached 89.7 Mhl in 2017.

Figure 14 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI at EU level (base 100 = 2005)



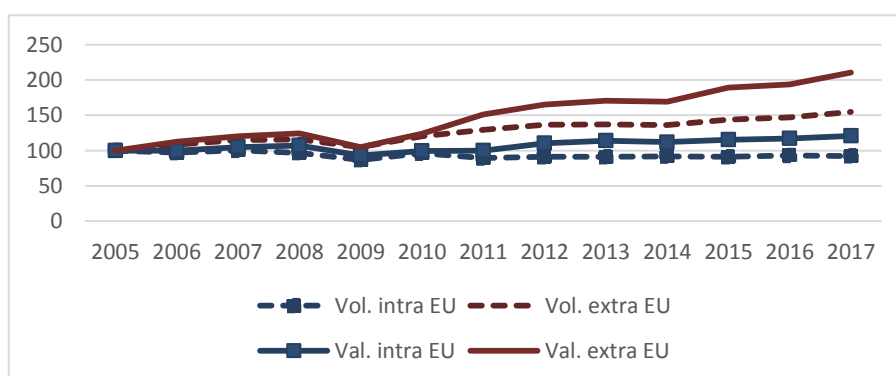
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Sales of wine by market (national, intra-EU, extra-EU)

Based on DG AGRI data, exports of wines to non-EU countries reached EUR 11.3 billion in 2017, thus, wine under GI/TSG accounted for 76% of extra-EU trade (57% in volume)⁴⁰.

Exports to non-EU countries largely increased (+29% in volume and +70% in value between 2010 and 2017) while national consumption and intra-EU trade remained relatively stable in volume and grew in value (+2% in volume and +27% in value for national consumption and -4% in volume and +21% in value for intra-EU trade). This confirms trends observed at world level with the emergence of new markets at international level in non-EU countries and, the increase in the unit price of wine.

Figure 15 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI at EU level (base 100 = 2005)

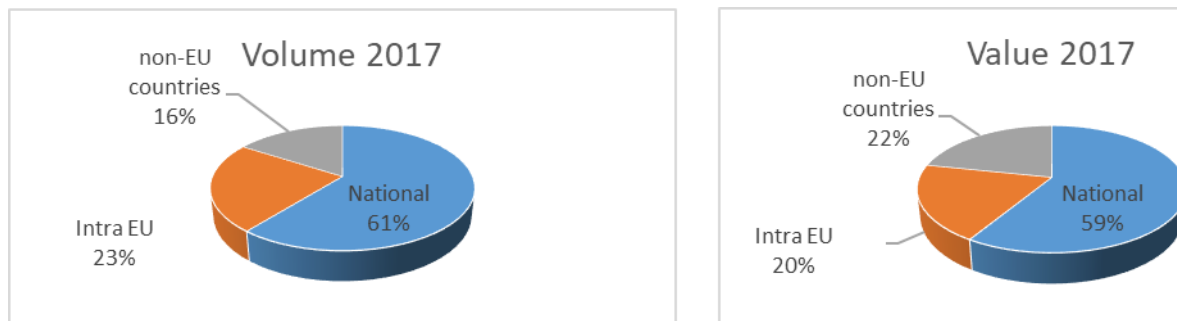


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⁴⁰ Some of the wine sold on intra-EU market is exported to non-EU countries. The total extra-EU trade was EUR 11.3 billion in 2017 (source: https://ec.europa.eu/agriculture/wine/statistics_en).

In 2017, national markets accounted for 61% of volume and 59% of value, intra-EU trade for 23% of volume and 20% of value, extra-EU trade for 16% of volume and 22% of value.

Figure 16 - Share of sales volume and value by market for wine under PDO/PGI at EU28 level in 2017



AND-I study for DG AGRI

Share of PDOs and PGIs

PDOs accounted for the largest share of both volume and value. However, due to its higher average price compared to PGIs (5.22 EUR/l for PDOs in 2017 compared to 2.39 EUR/l for PGIs), the share in value is higher than the share in volume (71% of volume and 84% of value in 2017 for PDOs). PGIs accounted for 29% of volume and 16% of value.

Figure 17 - Share of sales volume and value for PDOs and PGIs in the wine sector at EU28 level in 2017



Source: AND-I study for DG AGRI

At EU28 level, three MS accounted for 78% of volume and 82% of value: France, Italy and Spain.

Orientation of each MSs toward GIs

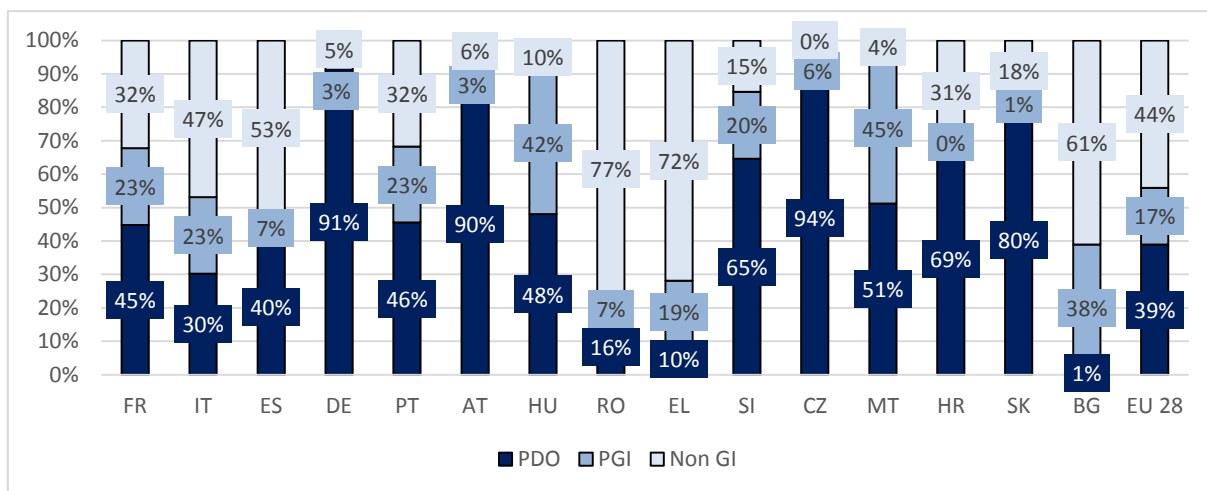
At EU28 level, 56% of the volume of wine is sold under PDO and PGI (average 2015-2017 in order to limit the impact of annual evolution of yields) and 44% is: wine without GI, wine spirit, wine vinegar, etc.

There are differences among MSs:

- Some MSs have very a strong orientation toward GI (at least 80% of volume): Germany, Austria, Hungary, Czechia, Slovakia and Luxembourg;
- Some MSs have a balanced orientation between GI and non-GI (between 30% and 80% of volume under GI), this includes the main wine producers in the EU: France, Italy, Spain, Portugal and also Croatia, and Slovakia;

- Some MSs have a low orientation toward GI (less than 40% of volume under GI): Romania, Greece, Bulgaria and Cyprus.

Figure 18 - Share of volume of wine used for PDO, PGI and non-GI by MS (average 2015-2017)



Source: based on AND-I survey for DG AGRI and balance supply for wine in each MS based on DG AGRI data

Sales volume and sales value by MS

In 2017, the sales volume in France, Italy and Spain ranged between 14.7 Mhl and 30.5 Mhl, and the sales value between EUR 4.5 billion and EUR 19.4 billion.

The sales volume in each of the following five MSs was over 1 Mhl and EUR 200 million: Germany, Portugal, Austria, Hungary and Romania. In other MS, the volume sold under GI was lower than 1 Mhl in 2017.

Table 41 - Sales volume and sales value for wine under PDO and PGI in the main Member States

	Volume total (hl)	Value total (kEUR)	Evol. vol. 2017-2010	Evol. val. 2017-2010	% vol 2017	% val 2017
FR	30 461 824	19 379 588	1%	25%	33.9%	49.2%
IT	24 528 834	8 602 643	4%	51%	27.3%	21.8%
ES	14 718 401	4 460 256	23%	27%	16.4%	11.3%
DE	7 098 514	3 216 122	-14%	52%	7.9%	8.2%
PT	4 392 998	1 676 021	25%	44%	4.9%	4.3%
AT	1 873 985	666 849	-23%	9%	2.1%	1.7%
HU	2 481 606	301 555	76%	59%	2.8%	0.8%
RO	1 060 547	215 302	-36%	-19%	1.2%	0.5%
EL	698 297	207 192	-13%	3%	0.8%	0.5%
SI	546 114	192 799	-14%	77%	0.6%	0.5%
CZ	672 250	156 006	126%	183%	0.7%	0.4%
MT	13 947	12 840	15%	76%	0.0%	0.0%
HR	440 256	107 027	-1%	-2%	0.5%	0.3%
Others	758 453	224 050		149%	0.8%	0.6%
Tot	89 746 025	39 479 051	-34%	33%	100.0%	100.0%

Source: AND-I study for DG AGRI

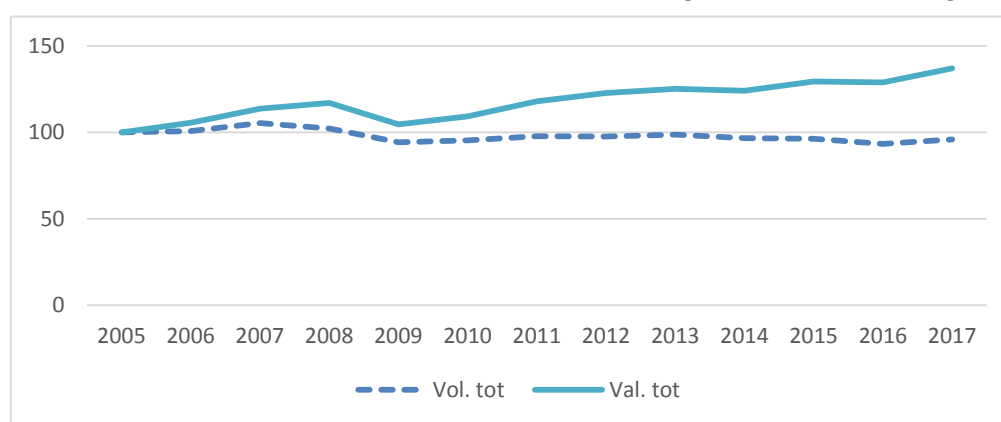
F.2.3 Focus in the main MS

This section provides details on the first five MSs in terms of sales value and sales volume for wine under GI: France, Italy, Spain, Germany and Portugal. They accounted for 90% of the EU28 sales volume and 95% of the EU28 sales value of wine under GI in 2017.

F.2.3.1 France

French wine under PDO and PGI grew by 25% in value and 1 % in volume between 2010 and 2017. It reached EUR 19.4 billion in 2017 and is the top MS for wine under GI both for sales volume and sales value. Main producing regions in France are Bordeaux, Champagne, Languedoc-Roussillon and Rhône.

Figure 19 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI in France (base 100 = 2005)



Source: AND-I study for DG AGRI

In 2017, two thirds of the sales volume under GI were under PDO, and this accounted for 87% of sales value. There are several PDOs with a high level of valorisation in France, such as Champagne (regional PDO with high volume) and small-scale PDOs (called "village" or "communale" depending on the region, which means that the protected area is a village) with limited volumes and high average prices. Some "regional" PDOs are produced in each region, for these PDOs, the volume of production is high, and the average price is lower than for "village" or "communale" PDOs. There may be also some "sub-regional" PDOs, at an intermediary level (in terms of price and volume) between regional and "communales".

Regarding PGIs, areas covered can be very different. While PGI Pays d'Oc covers a whole region (NUTS 2 Region, Languedoc-Roussillon), some other PGIs cover a department (NUTS 2 area, for instance PGI Aude) or a smaller territory, for instance: PGI Coteaux d'Enserune. PGIs covering smaller territories tend to get higher prices. However, Regional PGI Pays d'Oc is an exception: this is one of the largest GI in terms of sales volume at EU28 level and its unit price is among the highest of the different PGIs. This is due to the improvement of quality, and the focus on specific vine varieties which are expected by consumers.

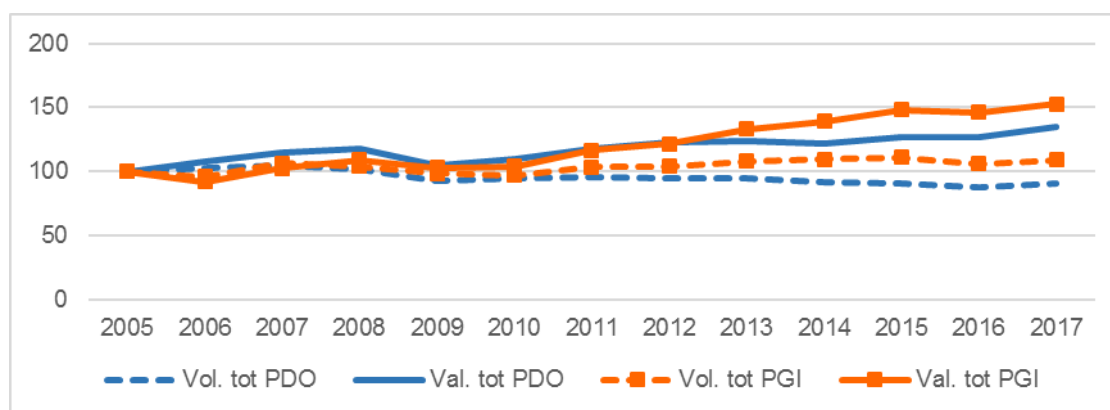
Figure 20 - Share of sales volume and value for PDOs and PGIs in the wine sector in France, 2017



Source: AND-I study for DG AGRI

In this context, sales for PGI are more dynamic than PDOs in terms of sales volume (+12% for PGIs since 2017 versus -5% for PDOs). However, the growth in sales on extra-EU markets is much more significant for PDOs with a 83% growth in value since 2010 (compared to +27% for PGIs),

Figure 21 - Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO and PGI in France (base 100 = 2005)



Source: AND-I study for DG AGRI

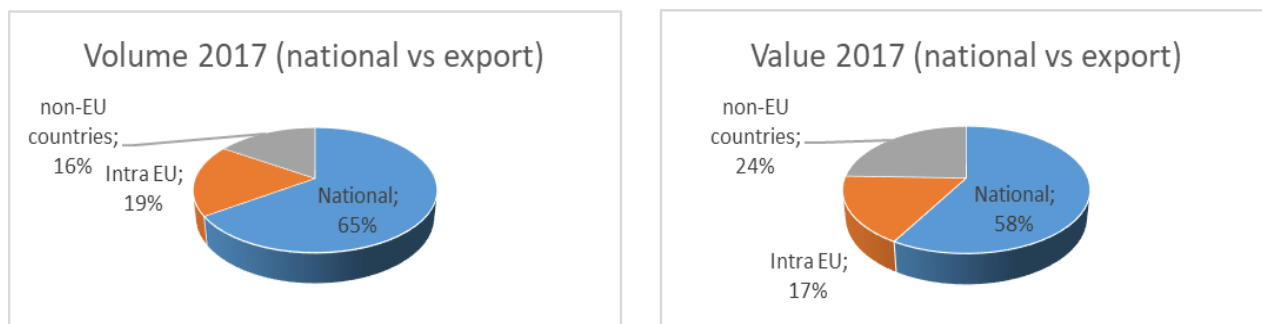
Most of the sales volume is in the national market (65 % in 2017), and this accounts for 58 % of sales value. France imports some wines from Spain in order to supply its national market. This is mainly wine without GI, for which production is limited in France (4.6 Mhl of wine was imported from Spain in 2017/18 according to FranceAgriMer data).

The most valuable market is exports to non-EU countries, with the average price at 9.83 EUR/l compared to 6.36 EUR/l on the national market and 5.66 EUR/l for intra-EU trade.

Exports to non-EU countries were at their lowest point in 2009 due to global economic crisis. These have constantly been growing since this period and reached 24 % of sales value and 16 % of sales volume in 2017 (EUR 4.7 billion in 2017; +110 % since 2009).

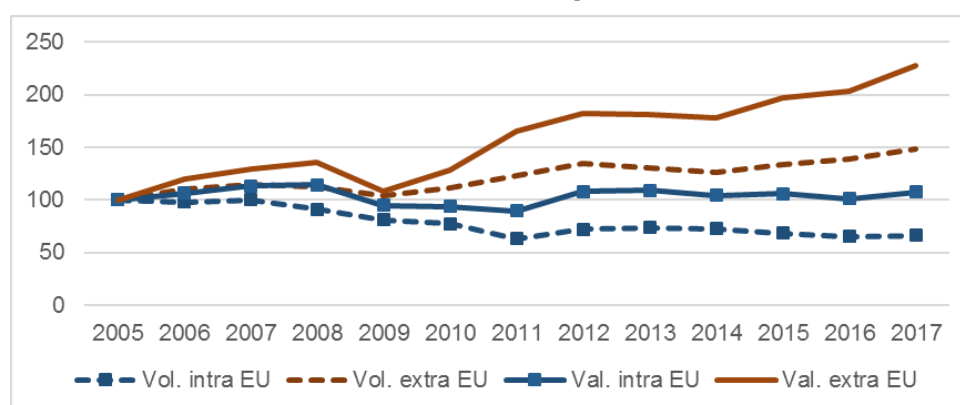
The main markets for French wines are Germany, China (having a strong increase over the last decade), the US and the UK (with a strong decrease over the last decade).

Figure 22 - Share of sales volume and value by market for wine under PDO/PGI in France, 2017



Source: AND-I study for DG AGRI

Figure 23 – Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI in France (base 100 = 2005)

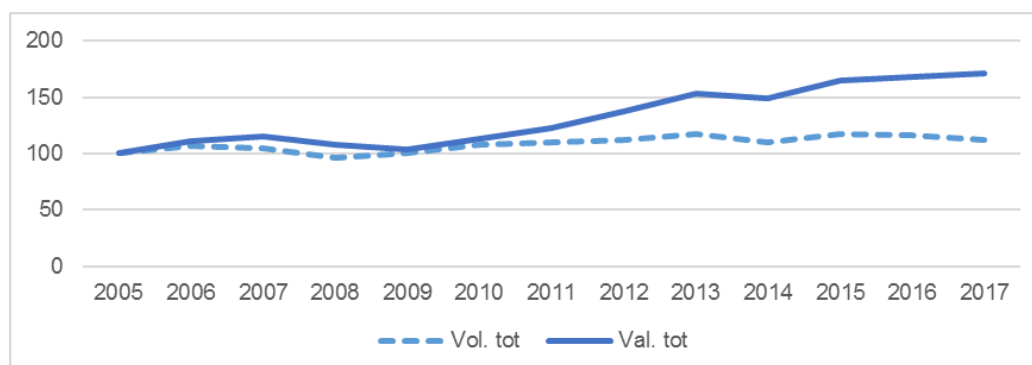


Source: AND-I study for DG AGRI

F.2.3.2 Italy

In 2017, sales volume reached 24.5 Mhl (+4% since 2010) and sales value was EUR 8.6 billion (+51% since 2010). Main producing regions were Friuli-Venezia Giulia, Piemonte, Tuscany and Veneto. The growth in volume and value was notably due to the PDO Prosecco, which became, within a few years, one of the main PDOs/PGIs in the EU. The area with the highest prices were in north west of Italy in Piemonte and Tuscany, the main PDOs in these areas were Chianti, Chianti Classico, Piemonte, Asti, Barbera d'Asti and Toscano/Toscana.

Figure 24 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI in Italy (base 100 = 2005)



Source: AND-I study for DG AGRI

In 2017, PDOs accounted for 61% of volume and 71% of value of wine sold under GI, with an average price of 4.10 EUR/l. PGIs accounted for 39% of volume and 29% of value with an average price of 2.60 EUR/l. Prices rose by 45% for PDOs and by 58% for PGIs between 2010 and 2017. Sales volume of PDOs and PGIs remained relatively stable between 2010 and 2017 (respectively +4% and +3%) while sales value increased (respectively +47% and +63%). Main PGIs are in Sicilia (with PGI Sicilia in particular) and Veneto (PGI Veneto). The sales value has increased since 2010 while sales volume decreased. Some areas from the southern part of Italy face difficulties and surfaces are decreasing, in particular in Sicilia and Puglia.

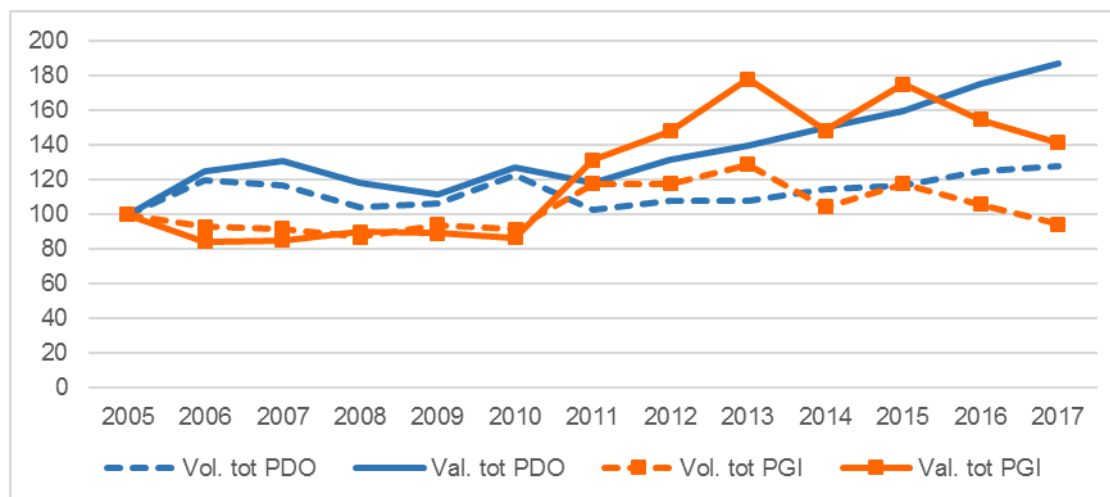
Part of the wine is used for the production of spirit drinks (including Grappa under GI).

Figure 25 - Share of sales volume and value for PDOs and PGIs in the wine sector in Italy, 2017



Source: AND-I study for DG AGRI

Figure 26 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO and PGI in Italy (base 100 = 2005)

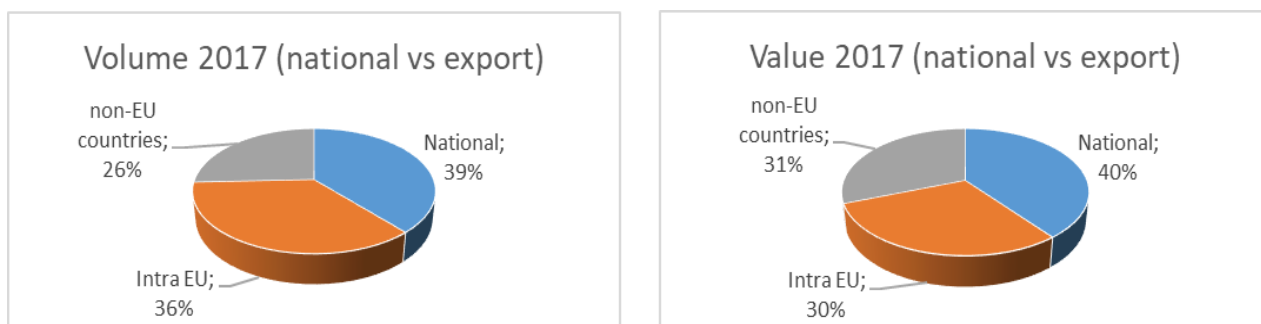


Source: AND-I study for DG AGRI

There was a strong orientation on whole exports markets for Italian wines, with 61 % of the volume and 60 % of the value in 2017. Exports were both in the internal market (35 % of total volume and 30 % of total value) and to non-EU countries, which accounted for 25 % of total volume and 31 % of total sales value. Italy was the top exporter (by volume) to the US, which was the top world market for wine. Other important markets for Italy were the UK and Germany. The orientation to exports was higher for PGIs than PDOs: 70 % and 55 %, respectively, of volume was exported in 2017 (intra- and extra-EU). The orientation towards exporting aimed to offset the

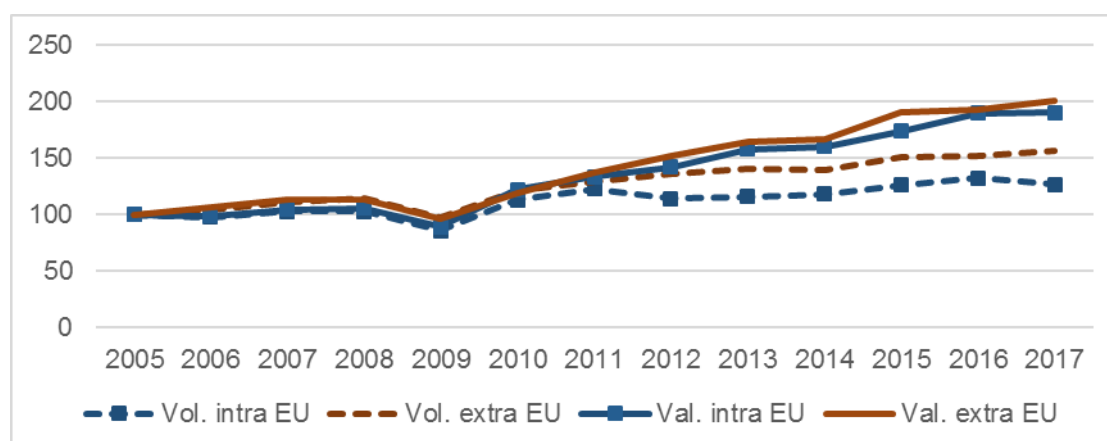
decrease of volume in the national market. Data from Mediobanca⁴¹ shows a decrease in wine sales through large-scale retailers, even if direct sales were increasing (for all wines – those with GIs and those without GIs).

Figure 27 -Share of sales volume and value by market for wine under PDO/PGI in Italy, 2017



Source: AND-I study for DG AGRI

Figure 28 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI in Italy (base 100 = 2005)



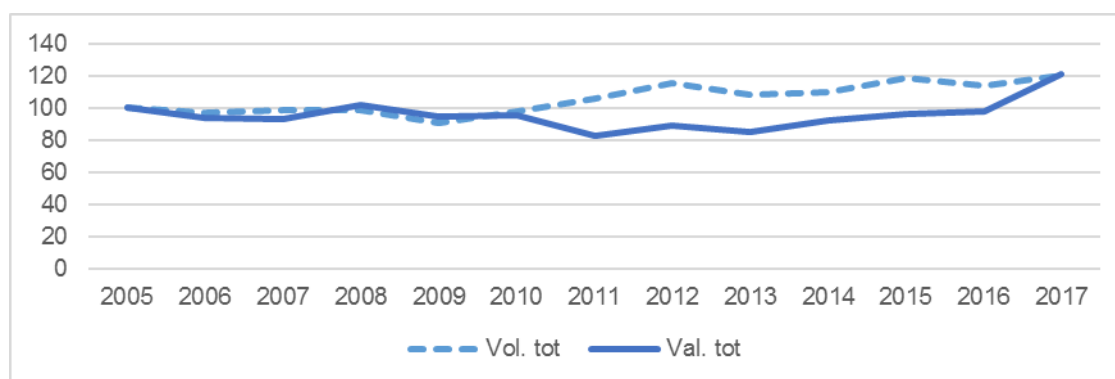
Source: AND-I study for DG AGRI

⁴¹ <http://www.inumeridelvino.it/2018/06/i-canali-di-vendita-del-vino-e-tipologia-di-etichette-indagine-mediobanca-2017.html>

F.2.3.3 Spain

Between 2010 and 2017 in Spain, total sales volume grew by 23% and sales value increased by 27% for PDOs/PGIs wines. Sales reached 14.7 Mhl and EUR 4.46 billion in 2017. Sales value was on a decreasing trend between 2010 and 2013 but increased after 2013. The growth in volume was more stable. Main production regions were Castilla y León, Castilla-La Mancha and La Rioja.

Figure 29 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI in Spain (base 100 = 2005)



Source: AND-I study for DG AGRI

Sales under PDOs accounted for the largest share of wines sold under GI with 84% of sales volume and 94% of sales value. Sales under PDO largely increased: +15% in volume and +23% in value between 2010 and 2017. PDOs were the most dynamic market for Spanish wines and were perceived as a way to develop in a difficult context for lower quality wines. Indeed, as mentioned in CNIV/FranceAgriMer study⁴², there was an over production of lower quality wine which lead to decrease of prices in some regions.

Sales under PGI largely increased from 2010 (+92% in volume and +210% in value) but only accounted for 16% of sales volume and 6% of sales value in 2017. Regarding PGIs, a large share of the production complied with PGI requirements in some regions (in particular in Castilla-La Mancha) but a part of the wine was finally sold without GI, this may be linked to the market demand for each type of product (PDO, PGI, wine without GI) and compliance with PGI requirements. For instance, based on data from MAPA⁴³, in Spain in 2016/17, 3.3 Mhl were produced under PGI and 2.3 Mhl were sold under PGI. The main PGI was Castilla with 1.8 Mhl sold in 2017. Strong interannual variations for PGI sales may be due to the share of wine produced under PGI and finally sold under the scheme.

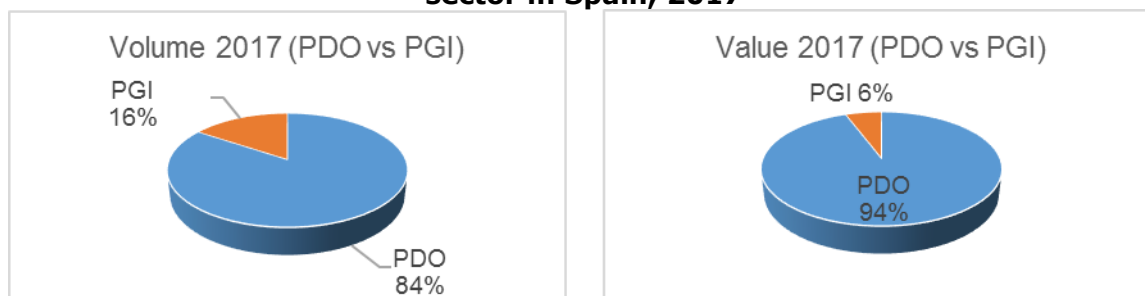
The three main PDOs/PGIs in terms of value in 2017 were PDOs⁴⁴: La Rioja (EUR 1 billion), Cava (EUR 743 million) and Ribera del Duero (EUR 404 million).

⁴² <https://www.franceagrimer.fr/Actualite/Filieres/Vin-et-cidriculture/Vin/2016/Analyse-des-filieres-vitivinicoles-dans-le-monde>

⁴³ Source : https://www.mapa.gob.es/es/alimentacion/temas/calidad-agroalimentaria/informeiqp2016-2017_tcm30-452253.pdf

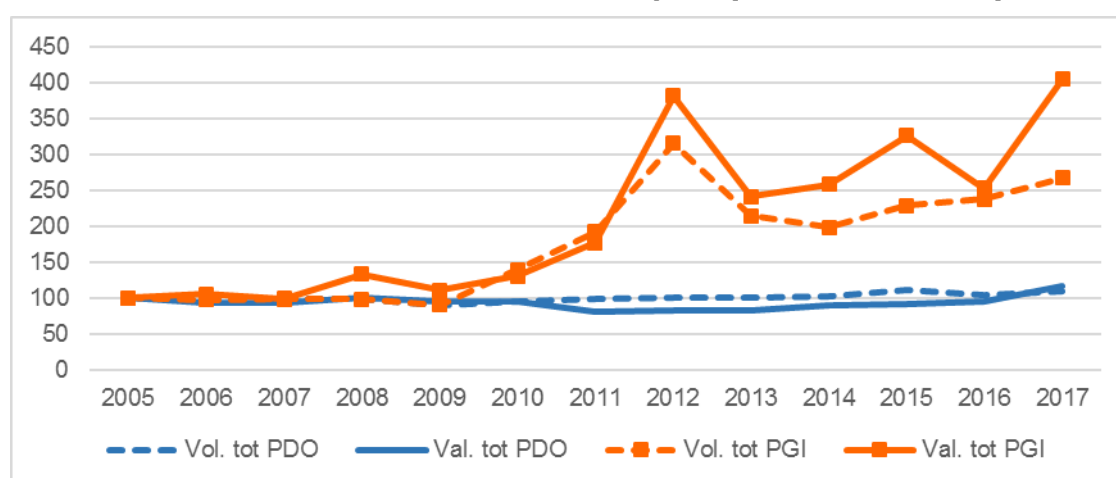
⁴⁴ Publicly available data at: <https://www.mapa.gob.es/es/alimentacion/temas/calidad-agroalimentaria/calidad-diferenciada/dop/htm/cifrasydatos.aspx>

Figure 30 - Share of sales volume and value for PDOs and PGIs in the wine sector in Spain, 2017



Source: AND-I study for DG AGRI

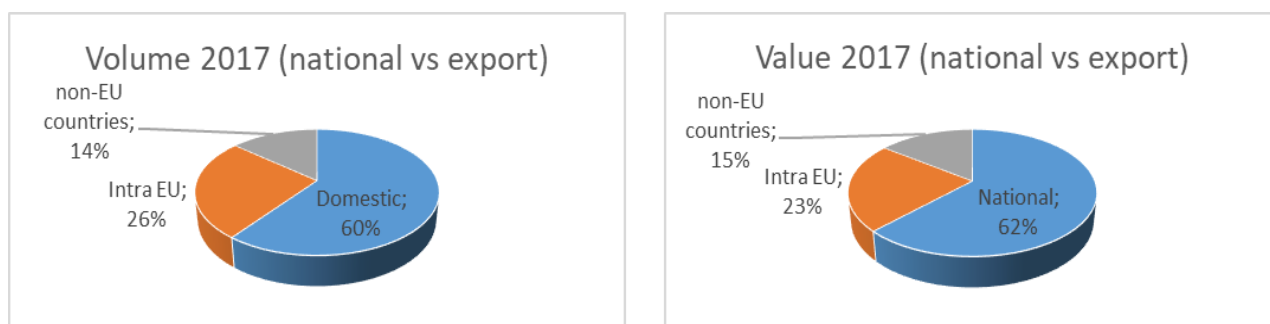
Figure 31 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO/PGI in Spain (base 100 = 2005)



Source: AND-I study for DG AGR

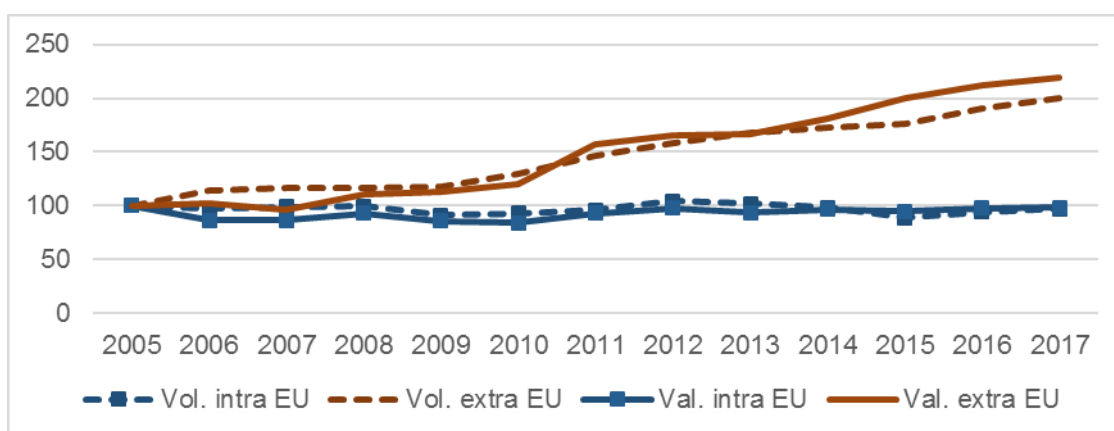
The breakdown between markets were quite similar in terms of volume and value: 62% of the sales value was from the national market, 23% from intra-EU trade and 15% from export to non-EU countries. The increase of extra-EU trade since 2010 was significant with +54% in volume and +82% in value.

Figure 32 - Share of sales volume and value by market for wine under PDO/PGI in Spain, 2017



Source: AND-I study for DG AGRI

Figure 33 – Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO / PGI in ES (base 100 = 2005)

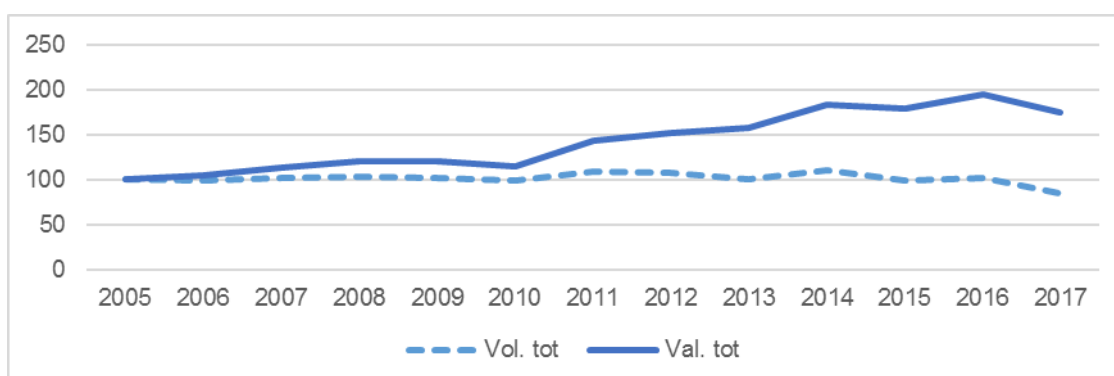


Source: AND-I study for DG AGRI

F.2.3.4 Germany

In Germany in 2017, sales volume for wine reached 7.1 Mhl (-14% from 2010) and EUR 3.2 billion (+52% from 2010). The main producing area was Rhein Mosel with 68% of the sales volume. Main GIs are located in this region: Pfalz and Rheinhessen.

Figure 34 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO / PGI in Germany (base 100 = 2005)



Source: AND-I study for DG AGRI

GIs were almost exclusively oriented toward PDOs which accounted for 97% of sales volume and 99% of sales value. There were 26 PGIs registered but volumes remained limited (maximum of 0.5 Mhl in 2012).

Figure 35 - Share of sales volume and value for PDOs and PGIs in the wine sector in Germany, 2017

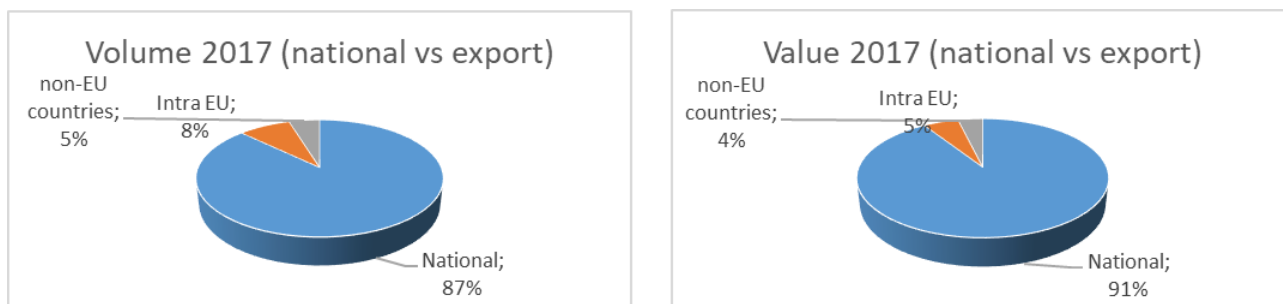


Source: AND-I study for DG AGRI

German wine was mainly sold in the national market, and this accounted for 87 % of sales volume and 91 % of sales value. In order to supply its market, Germany was also a large importer: 15.1 Mhl was imported in 2017, making Germany one of the main world importers.

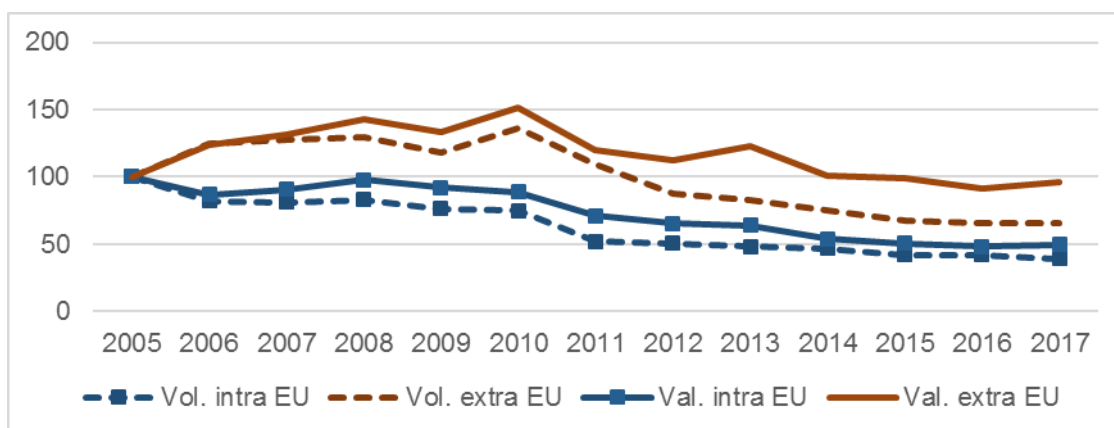
In this context, sales volume and value of whole exports markets strongly decreased from 2010 (-47 % volume intra-EU and -52 % extra-EU) in order to maintain the volume in the national market (-4 %).

Figure 36 - Share of sales volume and value by market for wine under PDO/PGI in Germany, 2017



Source: AND-I study for DG AGRI

Figure 37 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO / PGI in Germany (base 100 = 2005)

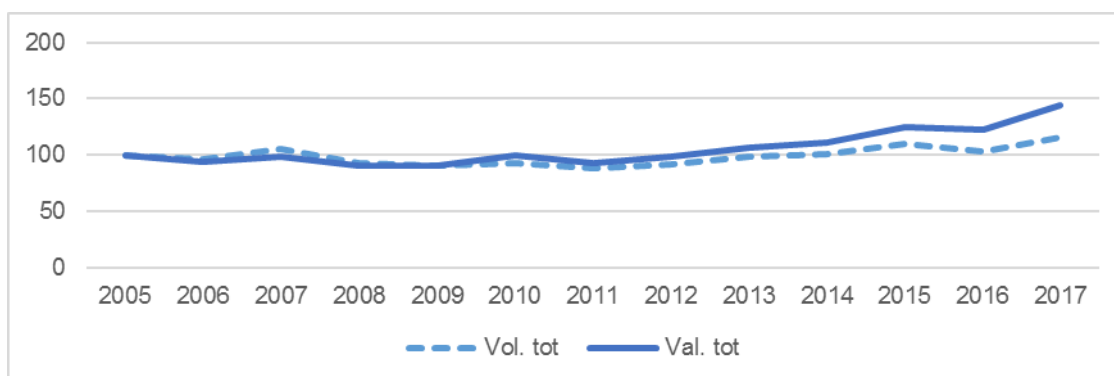


Source: AND-I study for DG AGRI

F.2.3.5 Portugal

Sales volume and sales value grew by 25% and 44%, respectively, between 2010 and 2017. We observe a strong increase in the unit price over this period: 3.07 EUR/l in 2005, 3.31 EUR/l in 2010 and 3.82 EUR/l in 2017. Main producing regions were Alentejo, Lisbon and North part of the country.

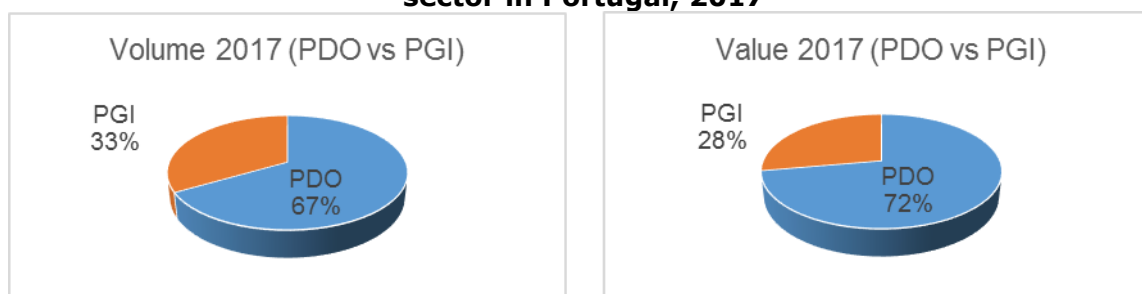
Figure 38 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO / PGI in Portugal (base 100 = 2005)



Source: AND-I study for DG AGRI

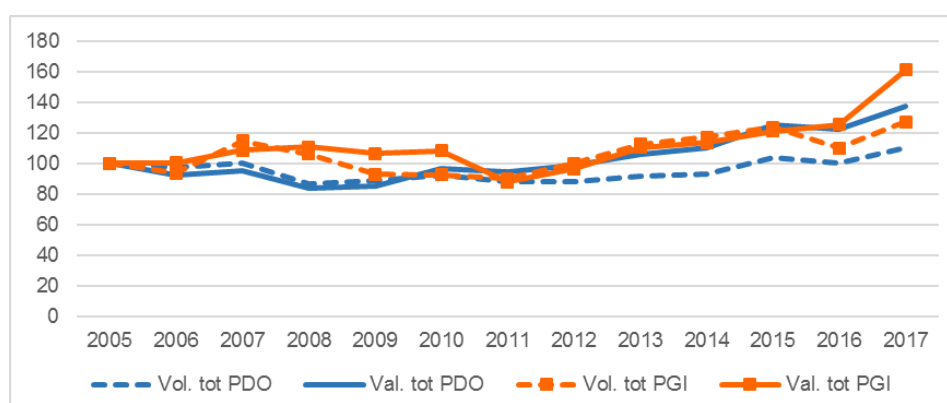
PDOs accounted for 67% of volume and 72% of value in 2017, while PGIs accounted for 33% of volume and 28% of value. The difference in valorisation between PDOs and PGIs was less than 1 EUR/l in 2017 (4.13 EUR/l for PDOs and 3.18 EUR/l for PGIs). This difference in valorisation was relatively low compared to other MSs.

Figure 39 - Share of sales volume and value for PDOs and PGIs in the wine sector in Portugal, 2017



Source: AND-I study for DG AGRI

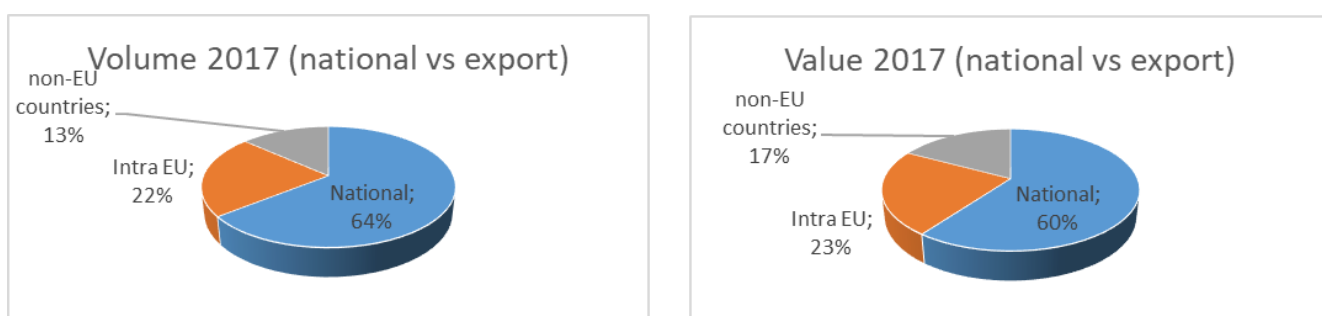
Figure 40 – Evolution index of the sales volume and value between 2005 and 2017 for wine under PDO and PGI in Portugal (base 100 = 2005)



Source: AND-I study for DG AGRI

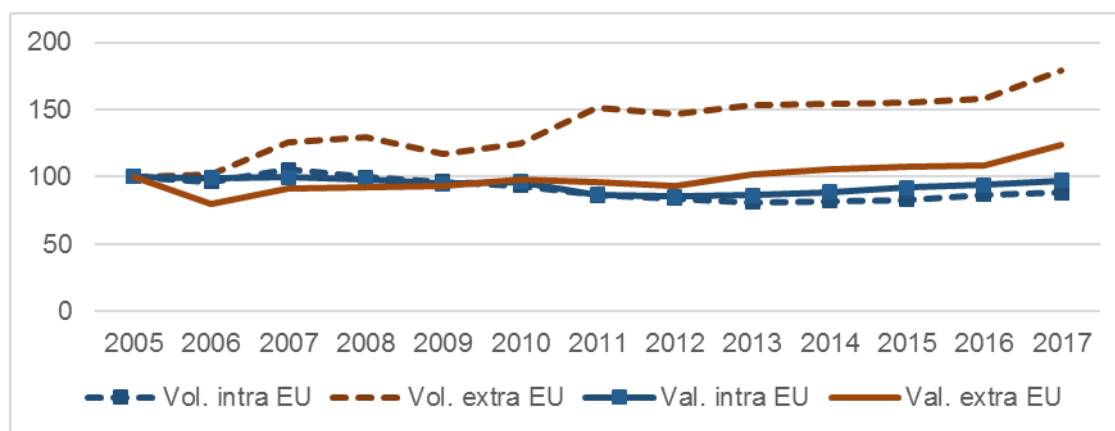
The national market accounted for 64 % of volume and 60 % of value, intra-EU trade for 22 % of volume and 23 % of value, exports to non-EU countries for 13 % of volume and 17 % of value. Exports to non-EU countries grew markedly from 2005 (+79 % in volume and +23 % in value). The average price decreased significantly for extra-EU trade: 7.04 EUR/l in 2005, 5.57 EUR/l in 2010 and 4.85 EUR/l in 2017. However, the price in the extra-EU market remained higher than the price in other markets. Main markets for Portuguese wines were France (stable), the US (on a growing trend), the UK (gradually growing) and Angola (with a strong evolution since 2010 due to the economic context in this country, though a decrease after 2014).

Figure 41 - Share of sales volume and value by market for wine under PDO/PGI in Portugal, 2017



Source: AND-I study for DG AGRI

Figure 42 - Evolution index of the sales volume and value for intra and extra-EU trade between 2005 and 2017 for wine under PDO/PGI in Portugal (base 100 = 2005)



Source: AND-I study for DG AGRI

F.3 Spirit drinks

F.3.1 Total sales

The estimate for total GI spirit drinks sales in 2017 was EUR 10.3 billion, compared to EUR 8.2 billion in 2010. The growth rate for this period was 26 % (Average Annual Growth Rate – AAGR: 3.3 %).

A very concentrated production

Production is concentrated in few MSs: the UK, France and Ireland made up 90 % of the total value of GI spirit sales.

Five other MSs recorded a share between 1% and 3%: Poland, Sweden, Italy, Germany and Spain.

The other 15 MSs provided a 1.3 % share, while four MSs had no production in 2017 (Czechia, Denmark, Latvia and Luxembourg).

Various growth rates

Changes between 2010 and 2017 were not homogeneous.

AAGR exceeded 5 % in six MSs: Hungary (10.8 %), Germany (8.5 %), Ireland (7.9 %), France (7.5 %), Belgium (6.9 %) and Portugal (6.2 %).

AAGR was between 0 % and 5 % in seven MSs: Bulgaria (4.7 %), Austria (3.0 %), Italy (1.3 %), the UK (1.0 %), Sweden (0.8 %) and Poland (0.3 %).

In all the other MSs, the sales value of GI spirit drinks decreased. In Latvia and Luxembourg, modest production was noted in 2010, but this has ceased.

F.3.2 Spirit types

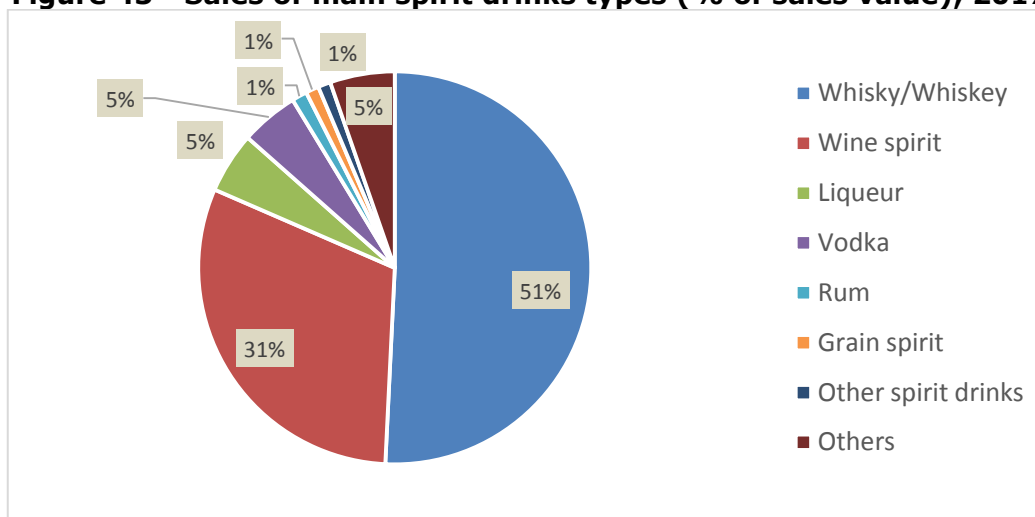
Figure 43 shows a breakdown of GI spirit drinks sales according to the main types. Shares of whiskies and wine spirits were the most important, due not only to the importance of British and French products, but also to GI whiskies/whiskeys produced in Ireland and France. GI wine spirits are also produced in Bulgaria, Portugal and Romania. In addition, GI Brandy/Weinbrand (sales of which accounted for EUR 70 million in 2017, with receipts close to those of wine spirits) are produced in Austria, Germany, Italy and Spain.

Liqueurs had a 5 % share; this type of product was produced in 13 MSs, the most important of which were Ireland, Italy, Austria and Germany.

Vodka had another 5 % share; Poland was the main producer, followed by Sweden, Lithuania, Estonia and Finland.

Two other types had a 1 % share: rum, produced in France's outermost regions and in Portugal; and other grain spirits (excluding whiskies and vodkas), produced mainly in Austria, Germany and Lithuania.

Figure 43 - Sales of main spirit drinks types (% of sales value), 2017



Source: AND international study for DG AGRI

Changes in value sales varied from one spirit type to another: the AAGR was 10 % for rums, 9 % for grain spirits, 8 % for wine spirits, 2 % for whiskies/whiskeys, 2 % for liqueurs, 0 % for vodkas and –1 % for all the other types taken together.

This shows that well-known international products seem to enjoy a competitive advantage over the more typical products. Whole exports analysis can explain this finding.

F.3.3 Whole exports sales

Export (intra-EU trade and exports to non-EU countries) is fundamental for the main GI spirit drinks sectors. Table 42 shows the differences between the great worldwide famous spirit drinks and other types.

Table 42 - Breakdown of sales according to destinations (% of sales value), 2017

Spirit drinks	National market	Intra-EU trade	Non-EU country exports	Total
Whisky/Whiskey	7%	29%	64%	100%
Wine spirit	3%	12%	85%	100%
Liqueur	15%	22%	63%	100%
Vodka	36%	30%	34%	100%
Rum	87%	11%	2%	100%
Grain spirit	86%	14%	0%	100%
Other GI spirit drinks	71%	15%	14%	100%

Source: AND international survey for DG AGRI

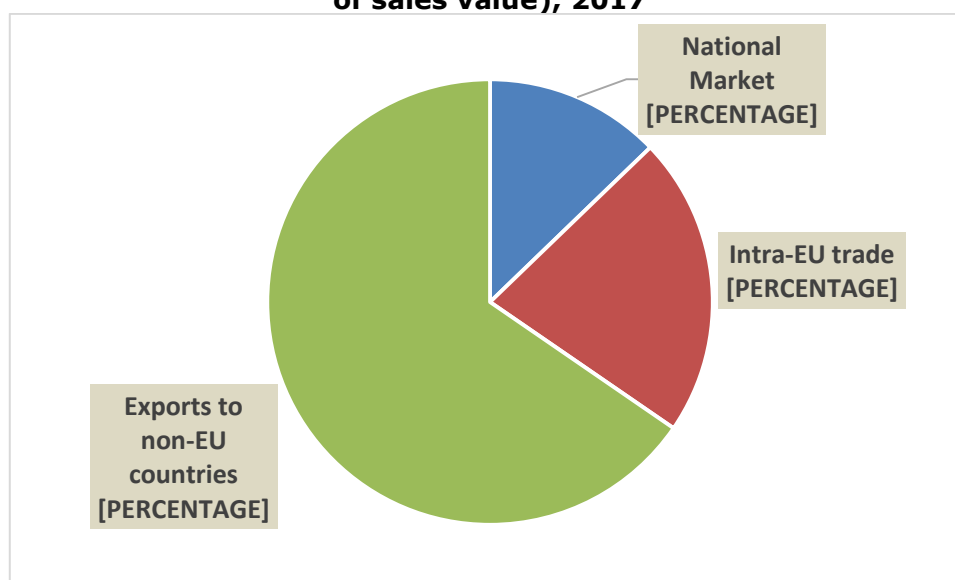
In 2017, the share of whole exports was 93 % for whiskies/whiskeys and 97 % for wine spirits. In both cases, non-EU destinations dominated the trade (64 % for whiskies/whiskeys and 85 % for wine spirits).

The situation and evolution were comparable for liqueurs and, to a lesser extent, vodkas.

For the other categories, notably rums and grain spirits, local markets dominated. This was also the case for other GI spirit drinks.

On the whole, exports to non-EU countries accounted for 65 % of all GI spirit drinks sales, as shown in Figure 44. Internal trade accounted for 22 % of total sales.

Figure 44 - Breakdown of GIs spirit drinks sales according to destinations (% of sales value), 2017



Source: AND international survey for DG AGRI

Who were the main clients for the EU28 GI spirit drinks? This question can be illustrated by the cases of Cognac, Scotch Whisky and Ouzo.

Table 43 - Main destinations for Cognac (% of value of exports to non-EU countries)

RANK	COUNTRY	SHARE OF EXPORT TO NON-EU COUNTRIES
1	UNITED STATES	44%
2	SINGAPORE	17%
3	CHINA	17%
4	HONG KONG	3%
5	PANAMA	2%
6	CANADA	1%
7	SOUTH AFRICA	1%
8	NIGERIA	0.9%
9	RUSSIA	0.8%
10	SOUTH KOREA	0.8%
11	NORWAY	0.6%
12	AUSTRALIA	0.6%
13	JAPAN	0.5%
14	MEXICO	0.4%
15	INDIA	0.1%
16	UKRAINE	0.1%
17	KENYA	0.1%
18	NEW-ZEALAND	0.1%
19	TURKEY	0.1%
20	URUGUAY	0.1%

Source: AND international survey for DG AGRI

This market, worth EUR 2.7 billion in 2017, depends to a large extent on just a few partners: the US, Singapore, China and Hong Kong together account for 80 % of the sales value. Even so, the other 20 % is of no small interest; for instance, Cognac sales in Uruguay are worth EUR 1.3 million.

The case of Scotch Whisky is slightly different. The top three destinations (the US, Singapore and Taiwan) accounted for only 46 % of the total sales to non-EU countries; thus, Scotch Whisky trade was much more diversified.

Table 44 - Main destinations for Scotch Whisky (% of value of exports to non-EU countries)

RANK	COUNTRY	Share OF EXPORT TO NON-EU COUNTRIES
1	UNITED STATES	31%
2	SINGAPORE	10%
3	TAIWAN	5%
4	UNITED ARAB EMIRATES	4%
5	SOUTH AFRICA	4%
6	MEXICO	4%
7	INDIA	3%
8	AUSTRALIA	3%
9	JAPAN	3%
10	CANADA	3%
11	SOUTH KOREA	2%
12	CHINA	2%
13	BRAZIL	2%
14	TURKEY	2%
15	LEBANON	1.3%
16	DOMINICAN REPUBLIC	1.3%
17	URUGUAY	1.2%
18	PANAMA	1.2%
19	ISRAEL	1.0%
20	SWITZERLAND	1.0%
21	PERU	1.0%
22	THAILAND	0.9%
23	CHILE	0.9%
24	IRAQ	0.8%
25	COLOMBIA	0.8%
26	PARAGUAY	0.5%
27	MALAYSIA	0.5%
28	ARGENTINA	0.5%
29	MOROCCO	0.4%
30	HONG KONG	0.4%
31	VENEZUELA	0.4%
32	VIETNAM	0.3%
33	NIGERIA	0.3%
34	ETHIOPIA	0.3%
35	ARUBA	0.3%
36	NEW ZEALAND	0.3%
37	SURINAM	0.3%
38	QATAR	0.3%
39	ECUADOR	0.3%
40	RUSSIA	0.3%
41	KENYA	0.2%
42	OMAN	0.2%
43	PHILIPPINES	0.2%
44	CURACAO	0.2%
45	NORWAY	0.2%
46	ANGOLA	0.2%
47	BAHRAIN	0.2%
48	ANDORRA	0.2%
49	CAMEROON	0.1%
50	GUATEMALA	0.1%
51	GEORGIA	0.1%
52	TRINIDAD & TOBAGO	0.1%
53	BOLIVIA	0.1%
54	MAURITIUS	0.1%
55	MONTENEGRO	0.1%
56	MYANMAR (BURMA)	0.1%
57	SRI LANKA	0.1%
58	EGYPT	0.1%
59	NORTH MACEDONIA	0.1%
60	JORDAN	0.1%
61	SERBIA	0.1%
62	EQUATORIAL GUINEA	0.1%
63	NEW CALEDONIA	0.1%
64	MACAO	0.1%
65	TOGO	0.1%
66	GABON	0.1%
67	CUBA	0.1%
68	GHANA	0.1%
69	ST MAARTEN	0.1%
70	NAMIBIA	0.1%
71	IVORY COAST	0.05%

Source: AND international study for DG AGRI

Ouzo is a Greek spirit. Compared to Scotch Whisky and Cognac, the market, worth EUR 35.8 million, was mainly European countries. Germany was the main destination and accounted for 57.2 % of the total sales. Iraq, Bulgaria and the Netherlands shared 32.4 % of the value of whole exports. As with Scotch Whisky, trade was broad, and the remaining 10 % was distributed among 23 countries.

Table 45 - Main destinations for Ouzo (% of value of intra-EU trade and exports to non-EU countries)

RANK	COUNTRY	SHARE OF EXPORT
1	GERMANY	57.2%
2	IRAQ	18.0%
3	BULGARIA	8.4%
4	NETHERLANDS	6.0%
5	UNITED STATES	1.6%
6	CYPRUS	1.3%
7	NORTH MACEDONIA	0.9%
8	BELGIUM	0.9%
9	FRANCE	0.7%
10	CANADA	0.6%
11	AUSTRALIA	0.6%
12	UNITED KINGDOM	0.5%
13	ISRAEL	0.5%
14	AUSTRIA	0.4%
15	ITALY	0.4%
16	SERBIA	0.3%
17	TURKEY	0.2%
18	ROMANIA	0.2%
19	HUNGARY	0.2%
20	SWEDEN	0.2%
21	CZECHIA	0.2%
22	ALBANIA	0.1%
23	SWITZERLAND	0.1%
24	POLAND	0.1%
25	FINLAND	0.1%
26	SPAIN	0.1%
27	SLOVAKIA	0.1%

Source: AND international survey for DG AGRI

F.4 Aromatised wine products

There are five names registered as GIs in the aromatised wine products scheme: Nürnberger Glühwein (Germany), Thüringer Glühwein (Germany), Vermouth de Chambéry (France), Vermouth di Torino (Italy) and Samoborski bermet (Croatia). The information available on these GIs was limited. Thus, a large part of the data for this sector has been estimated. Furthermore, because of confidentiality matters related to the limited number of GIs, detailed data per MS cannot be provided.

The estimated sales value of these GIs was EUR 43 million, which represented 0.05 % of the total sales of the GI products. The average sales value per GI was EUR 6.4 million, which was higher than the median size of GIs from all schemes. Exports to extra-EU markets were estimated at EUR 8.7 million, representing 15.6 % of the sales value of these GIs.

The limited sales under GIs did not reflect the importance of the aromatised wine sector in the EU, notably vermouth production in Italy.

G. ANALYSIS BY MEMBER STATE

G.1 Proposed groups of MSs with comparable features

The total sales value under GI was EUR 74.8 billion in 2017, this accounted for 7% of the total EU food and drinks sectors. We observe large difference between the different MS.

Five MS with sales value under GI over EUR 5 billion each

In 2017, the sales value under GI was over EUR 5 billion in France (EUR 26.7 billion), Italy (EUR 15.8 billion), Germany (EUR 8.7 billion), the UK (EUR 7.7 billion) and Spain (EUR 6.2 billion). These five MSs accounted for 87% of the sales value under GI.

In these MSs, GIs accounted for a large share of the food and drinks sector: between 5% and 15%. The breakdown between sector varied among these MSs: 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 and foodstuffs and wines in Italy. The share of sales out of national market were high in three MSs (France, Italy and the UK, with 43% to 69% of sales value) and were more moderate in Spain and Germany (18% and 13% of sales value).

Four MSs with sales value between EUR 0.9 billion and EUR 2 billion and important share of the national food and drinks sector under GI

The sales value under GI is important in Portugal, Greece, Czechia and Austria compared to the national food and drinks sector: from 4% to 12% of the national sector under GI. The sales value under GI was EUR 1.8 billion in Portugal, EUR 1.2 billion in Greece and EUR 0.9 billion in Czechia and Austria. There is a strong orientation toward agricultural products and foodstuffs in Greece and Czechia and toward wine in Portugal and Austria. These MSs accounted for 7% of total sales value under GI.

Five MSs with sales value between EUR 0.1 billion and EUR 1.6 billion and important sales value out of the national market

Five other MS had a strong orientation of sales out of their national market (from 48% of total sales value to 96%): the Netherlands (EUR 1.6 billion under GI), Ireland (EUR 1.0 billion), Poland (EUR 0.4 billion), Sweden (EUR 0.2 billion) and Denmark (EUR 0.1 billion). These MSs were characterized by the importance of agricultural products and foodstuffs (the Netherlands and Denmark) and spirits (Ireland, Sweden and Poland). These MSs accounted for 4% of total sales value under GI.

Nine MSs with sales value under GI between EUR 13 million and EUR 397 million and large importance of wine

In nine other MSs, wine sector played an important role in the total sales value under GI: from 76% to 100%. These MSs are Hungary (EUR 397 million sales value under GI), Romania (EUR 218 million), Slovenia (EUR 218 million), Croatia (EUR 124 million), Slovakia (EUR 94 million), Bulgaria (EUR 83 million), Cyprus (EUR 22 million), Luxembourg (EUR 49 million) and Malta (EUR 13 million). These MSs accounted for 2% of total sales value under GI.

Other MSs: sales value under GI below EUR 60 million and low share of GI in the national food and drink sector

The remaining MSs are characterized by limited importance of GIs at national level. Sales value under GI was below EUR 60 million in each of these MSs. Among these MSs, the total sales value under GI reached a maximum of 0.5% of the total food and drinks sector. These MSs are Belgium, Finland, Lithuania, Estonia and Latvia.

The following table details the feature of the MSs.

Table 46 - Main features regarding each MS on the economics of GIs (excluding TSGs and aromatised wines)

MS	Sales value 2017 (EUR million)	% sales value agro-food products	% sales value wine	% sales values spirits	% food and drinks sectors ¹	% sales whole export (intra + extra EU)
FR	26 819	15%	72%	13%	14.9%	43%
IT	15 758	44%	55%	1%	11.8%	47%
DE	8 672	61%	37%	2%	5.1%	13%
UK	7 698	38%	0%	62%	6.5%	70%
ES	6 166	26%	72%	2%	6.4%	32%
PT	1 847	9%	91%	0%	11.8%	41%
NL	1 577	99%	1%	0%	2.1%	48%
EL	1 195	77%	17%	5%	8.4%	42%
IE	991	1%	0%	99%	4.2%	96%
CZ	937	83%	17%	0%	7.1%	26%
AT	935	21%	71%	8%	4.1%	23%
PL	433	25%	0%	75%	0.8%	38%
HU	397	20%	76%	5%	3.4%	24%
SE	226	22%	0%	78%	1.2%	76%
SI	218	12%	88%	0%	10.4%	6%
RO	218	0%	99%	1%	1.8%	5%
DK	133	100%	0%	0%	0.5%	72%
HR	124	5%	86%	9%	2.3%	10%
SK	94	15%	85%	1%	2.2%	1%
BG	83	12%	80%	8%	1.5%	35%
BE	57	49%	10%	41%	0.1%	16%
LU	49	20%	80%	0%	6.4%	31%
FI	29	99%	0%	1%	0.3%	19%
CY	22	2%	79%	19%	1.5%	7%
LT	20	32%	0%	68%	0.5%	5%
MT	13	0%	100%	0%	na	0%
EE	s	s	s	s	s	s
LV	s	s	s	s	s	s
EU	74 715	33%	53%	14%	7.0%	42%

s: statistical secret

1: based on 2016 data for national food and drinks sectors

Source: AND-I study for DG AGRI and EU Food & Drink Industry

G.2 France

Table 47 - Main figures for France

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	1 724 637	2 167 664	26%	98
AGRI-PGI	1 332 953	1 799 308	35%	141
AGRI-TOTAL	3 057 590	3 966 972	30%	239
WINE-PDO	13 718 971	16 842 792	23%	357
WINE-PGI	1 732 358	2 536 796	46%	75
WINE TOTAL	15 451 329	19 379 588	25%	432
SPIRIT DRINKS GI	2 094 387	3 472 469	66%	52
TOTAL	20 603 306	26 819 029	30%	723

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	108 608	148 288	37%	14 955	31 530	111%
AGRI-PGI	78 710	77 139	-2%	9 598	11 809	23%
AGRI-TOTAL	187 318	225 428	20%	24 553	43 339	77%
WINE-PDO	2 436 223	2 811 035	15%	2 410 352	4 410 809	83%
WINE-PGI	487 289	527 243	8%	264 354	335 616	27%
WINE TOTAL	2 923 512	3 338 277	14%	2 674 706	4 746 425	77%
SPIRIT DRINKS GI	377 094	415 843	10%	1 534 570	2 766 690	80%
TOTAL	3 487 924	3 979 548	14%	4 233 829	7 556 455	78%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	19.8%	21.0%	6%	7%	8%	16%
AGRI-PGI	16.9%	12.3%	-27%	7%	5%	-25%
AGRI-TOTAL	18.4%	15.9%	-14%	7%	7%	-2%
WINE-PDO	54.0%	50.8%	-6%	35%	43%	21%
WINE-PGI	40.8%	40.4%	-1%	43%	34%	-22%
WINE TOTAL	52.1%	49.2%	-6%	36%	42%	15%
SPIRIT DRINKS GI	25.4%	33.6%	32%	91%	92%	0%
TOTAL	37.8%	34.8%	-8%	37%	43%	15%

Source: AND International study for DG AGRI

Sales Value

Sales value reached EUR 26.8 billion in 2017. The main sector was wine under PDO, with important producing areas such as Champagne, Bordeaux and Côte-du-Rhône. The second sector was wine under PGI, the main denomination being PGI Pays d'Oc in Languedoc-Roussillon. The wine sector accounted for 72 % of the total sales value under GIs in France in 2017 (63 % for PDOs and 9 % for PGIs).

The agricultural products and foodstuffs under PDOs were mainly cheeses, which accounted for 82 % of sales value under PDO. There were 45 French cheeses under PDO. The main ones are (in alphabetical order) Beaufort, Cantal, Comté, Reblochon, Roquefort and Saint-Nectaire. Each of these PDOs is produced in mountain areas. In such cases, PDO is a strategy of differentiation where productivity is hampered by the geographical environment.

Regarding the agri-food sector under PGIs, more than half of the sales value in 2017 was from meat products and fresh meats. It covered many PGIs in the poultry sector, to which the French 'Label Rouge' system is associated. In addition, one of the main PGIs is Canard à foie gras du Sud-Ouest, which covers a large range of products – including 'foie gras', which is mainly consumed during the Christmas period. It also covered hams such as PGI Jambon de Bayonne and fresh meats in the bovine and lamb sectors (for instance, Veau d'Aveyron et du Ségala and Agneau du Limousin).

Spirit drinks accounted for 13 % of the total sales value. The largest share of the sales value was for the GI Cognac (wine spirit).

Comparison with 2010 sales value

The total sales value grew by 30 % between 2010 and 2017. The wine sector represented the largest growth with a sales value increase of EUR 3.9 billion, while volume remained relatively stable. Indeed, the improvement of quality and the strategy to target top-of-the-range markets allowed for an increase in the price premium.

Agri-food products increased by EUR 0.9 billion. About 60 % of this growth was related to products already registered in 2010, and about 40 % was related to new products.

The sales value for spirit drinks increased markedly, linked to the growth in Cognac, which was very dynamic in extra-EU markets.

Whole exports in 2010 and 2017

Most of whole exports were related to wine (42 % of the sales value for wine were in export markets). Exported volume tended to decrease in the intra-EU market (where consumption is decreasing) and increase in the extra-EU market, specifically to the US and China. The whole exports sales value grew for both internal and extra-EU markets.

Whole exports of spirit drinks accounted for more than one fourth of total value exported under GIs/TSGs in 2017. This was particularly due to Cognac, exported in extra-EU markets.

For agri-food products, whole exports markets accounted for 8 % of the sales value in 2017. Trade was mainly intra-EU and grew by 38 % between 2010 and 2017.

Weight in the EU GIs sales value

In 2017, France was the leading MS regarding sales value under GIs/TSGs at EU28 level and accounted for 34.8 % of the total EU28 sales value. France is particularly important for wine, making up 49.2 % of the EU28 sales value. It contributed 33.6 % for spirit drinks and 15.9 % for agri-food products.

G.3 Italy

Table 48 – Main figures for Italy

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	4 931 988	5 387 635	9%	165
AGRI-PGI	1 050 223	1 616 572	54%	124
AGRI-TOTAL	5 982 211	7 004 208	17%	289
WINE-PDO	4 152 429	6 091 928	47%	402
WINE-PGI	1 537 095	2 510 715	63%	119
WINE TOTAL	5 689 524	8 602 643	51%	521
SPIRIT DRINKS GI	134 366	151 237	13%	37
TOTAL	11 806 102	15 758 087	33%	847

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	1 014 930	1 121 384	10%	483 328	515 546	7%
AGRI-PGI	210 946	328 877	56%	143 489	186 120	30%
AGRI-TOTAL	1 225 876	1 450 260	18%	626 817	701 666	12%
WINE-PDO	1 128 995	1 745 952	55%	1 121 690	1 712 122	53%
WINE-PGI	498 403	809 500	62%	443 480	935 107	111%
WINE TOTAL	1 627 398	2 555 452	57%	1 565 170	2 647 229	69%
SPIRIT DRINKS GI	38 210	10 578	-72%	12 342	4 533	-63%
TOTAL	2 891 484	4 016 290	39%	2 204 329	3 353 429	52%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	56.6%	52.3%	-8%	30%	30%	0%
AGRI-PGI	13.3%	11.0%	-17%	34%	32%	-6%
AGRI-TOTAL	36.0%	28.1%	-22%	31%	31%	-1%
WINE-PDO	16.4%	18.4%	12%	54%	57%	5%
WINE-PGI	36.2%	40.0%	10%	61%	69%	13%
WINE TOTAL	19.2%	21.8%	14%	56%	60%	8%
SPIRIT DRINKS GI	1.6%	1.5%	-10%	38%	10%	-73%
TOTAL	21.7%	20.4%	-6%	43%	47%	8%

Source: AND International study for DG AGRI

Sales Value

Sales value in Italy was EUR 15.8 billion in 2017, balanced between wine and agri-food products (respectively, 55 % and 44 % of sales value).

In the wine sector, there was a balance in terms of volume between PDOs and PGIs. However, due to its better valorisation, the weight of PDOs was much higher than PGIs in the sales value (respectively, 71 % and 29 % of total sales value for wines under GIs). The main PDOs (in alphabetical order) were Asti, Chianti, Chianti Classico, Conegliano, Montepulciano d'Abruzzo, Piemonte and Prosecco. Most of these PDOs are located in the northern part of Italy. Volume under PGI tends to decrease. The main PGIs were in Sicilia, Veneto and Emilia-Romagna.

PDOs in the agri-food sector accounted for 34 % of total sales value in 2017, thanks to the large share of cheese and meat products under PDOs, mainly based in parts of northern Italy in flat areas. The largest PDOs were Grana Padano, Parmigiano Reggiano and Prosciutto di Parma (in alphabetical order).

The spirit drinks sector is made up of a set of small-scale denominations, including wine spirits (grappa) and fruit spirits.

Comparison with 2010 sales value

The growth of the wine sector between 2010 and 2017 was EUR 2.9 billion. This was notably due to PDOs. Both volume and value grew. We note the considerable growth of one PDO over the period – PDO Prosecco in Veneto – which saw a large development in national and export markets (intra-EU trade and exports to non-EU countries). Volume in the national market was stable for PDOs in a general context of decreasing consumption of PGIs and wine without GI.

Total sales volume and value for wine under PGI grew thanks to the increase of intra-EU and extra-EU trade (volume decreased in the national markets).

Agri-food products grew by EUR 1 billion, 70 % from PDOs/PGIs already registered in 2010 and 30 % due to newly registered PDOs and PGIs.

Whole exports in 2010 and 2017

Almost half of the total sales value was for export markets (intra-EU trade and exports to non-EU countries) (47 % in 2017). Wines under PGI and wines under PDOs were the sectors most oriented toward exports (respectively, 69 % and 57 %). The agri-food product share of exports reached 31 % in 2017.

The sales value was balanced between intra-EU and extra-EU exports. Italy is a large supplier for the main wine markets at world level; it is even the top supplier of wine to the US (which is the top wine market globally). Italy also provides significant supplies to the UK and Germany, which are important importers of wine.

Weight in the EU GIs sales value

In 2017, Italy accounted for 20.4 % of the EU28 sales value under GIs. In terms of the EU28 sales value share for agri-food products and wine, Italy represented 28.1 % and 21.8 %, respectively. However, its contribution was very low regarding spirit drinks, this sector being dominated by the UK, Ireland and France with Whisky and Cognac.

G.4 Germany

Table 49 – Main figures for Germany

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	193 155	77 051	-60%	12
AGRI-PGI	3 149 557	5 240 891	66%	77
AGRI-TOTAL	3 342 712	5 317 941	59%	89
WINE-PDO	2 076 646	3 177 110	53%	13
WINE-PGI	38 413	39 012	2%	26
WINE TOTAL	2 115 059	3 216 122	52%	39
SPIRIT DRINKS GI	75 963	138 283	82%	34
TOTAL	5 533 733	8 672 347	57%	162

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	0	174	n/a	35	118	239%
AGRI-PGI	245 778	505 034	105%	112 317	321 791	187%
AGRI-TOTAL	245 778	505 208	106%	112 352	321 909	187%
WINE-PDO	308 648	172 318	-44%	190 508	121 572	-36%
WINE-PGI	315	396	26%	144	146	1%
WINE TOTAL	308 964	172 713	-44%	190 652	121 717	-36%
SPIRIT DRINKS GI	8 400	15 985	90%	0	0	n/a
TOTAL	563 142	693 906	23%	303 004	443 627	46%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	2.2%	0.7%	-66%	0%	0%	2003%
AGRI-PGI	39.9%	35.8%	-10%	11%	16%	39%
AGRI-TOTAL	20.1%	21.3%	6%	11%	16%	45%
WINE-PDO	8.2%	9.6%	17%	24%	9%	-62%
WINE-PGI	0.9%	0.6%	-31%	1%	1%	16%
WINE TOTAL	7.1%	8.2%	14%	24%	9%	-61%
SPIRIT DRINKS GI	0.9%	1.3%	45%	11%	12%	5%
TOTAL	10.2%	11.2%	11%	16%	13%	-16%

Source: AND International study for DG AGRI

Sales Value

The total GI sales value for 2017 was EUR 8.7 billion. The number of protected designations reached 162 (144 in 2010 without mineral waters).

The main GI category in Germany was agricultural and food products covered by PGIs, which represented 60 % of the total sales value in 2017. Wines (PDO and PGI) accounted for 37 % of the total, spirit drinks made up 2 % and PDO foods contributed less than 1 %.

Within the main category (PGI agricultural and food products), the share of beers (49 %) and meat products (24 %) were important.

Comparison with 2010 sales value

The German global sales value increased by 57 % between 2010 and 2017 (AAGR: 6.8 %).

Apart from PDO agricultural and food products, sales of all categories increased. The spirit drinks category recorded the highest growth rate (82 %, mainly linked to the price), while growth in PGI agricultural and food product sales reached 66 % (due to natural growth and a growing number of protected designations: 77 in 2017 versus 38 in 2010). The major subcategories that contributed to the observed growth were meat products, beers, other products (spices, etc.), pastas, fresh fruit and vegetables and fresh meats.

The value of GI German wines increased by 52 % from 2010. PDO wines were much more developed than PGI wines. The value of sales of PDO wines grew by 53 %, despite lower volumes, thanks to the increase of prices.

Spirit drinks sales grew by 82 % thanks to higher volume and better average price.

Whole exports in 2010 and 2017

Since 2010, intra-EU sales grew by 23 %, and extra-EU sales increased by 46 %. Whole exports grew by 31 %.

This performance was a result of two trends: a decrease of wine exports (-41 %) and a strong growth in PGI agricultural and food products (131 %). It was also due to the limited importance of whole exports in the German GI sales value (16 % in 2010 and 13 % in 2017).

Spirit drinks exports were concentrated in the intra-EU market. Their value grew from EUR 8 million in 2010 to EUR 16 million in 2017.

Weight in the EU GIs sales value

The German share of the total EU GI value remained stable since 2010 (11 % in 2017 versus 10 % in 2010), but it grew in terms of total sales. This increase was related to the growth in the German national market for PGI agriculture products.

Concerning agri-food under PGI, Germany's share of the EU sales value decreased from 40 % to 36 %.

G.5 United-Kingdom

Table 50 – Main figures for the United-Kingdom

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	268 096	248 044	-7%	25
AGRI-PGI	1 059 302	2 696 433	155%	35
AGRI-TOTAL	1 327 398	2 944 477	122%	60
WINE-PDO	6 531	3 542	-46%	2
WINE-PGI	6 531	3 542	-46%	2
WINE TOTAL	13 062	7 085	-46%	4
SPIRIT DRINKS GI	4 433 539	4 746 311	7%	4
TOTAL	5 773 999	7 697 873	33%	68

	Export intra-EU (kEUR)			Export extra-EU (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	3 629	15 460	326%	11 510	14 395	25%
AGRI-PGI	242 685	734 166	203%	82 286	158 374	92%
AGRI-TOTAL	246 315	749 626	204%	93 796	172 769	84%
WINE-PDO	0	142	n/a	0	0	n/a
WINE-PGI	0	106	n/a	0	35	n/a
WINE TOTAL	0	248	n/a	0	35	n/a
SPIRIT DRINKS GI	1 491 001	1 400 649	-6%	2 566 184	3 028 988	18%
TOTAL	1 737 315	2 150 523	24%	2 659 980	3 201 793	20%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	3,1%	2,4%	-22%	6%	12%	113%
AGRI-PGI	13,4%	18,4%	37%	31%	33%	8%
AGRI-TOTAL	8,0%	11,8%	48%	26%	31%	22%
WINE-PDO	0,0%	0,0%	-58%	0%	4%	n/a
WINE-PGI	0,2%	0,1%	-63%	0%	4%	n/a
WINE TOTAL	0,0%	0,0%	-59%	0%	4%	n/a
SPIRIT DRINKS GI	53,7%	45,9%	-15%	92%	93%	2%
TOTAL	10,6%	10,0%	-6%	76%	70%	-9%

Source: AND International for DG AGRI

Sales Value

The total GI sales value for 2017 was EUR 7.7 billion. The number of protected designations was 68 (compared to 44 in 2010).

The main GI category in the UK was spirit drinks, which made up 62 % of the total sales in 2017. PGI agricultural and foodstuff products accounted for 35 % of the total sales, while PDO agricultural products and foodstuffs accounted for 3 % and wines for 0.1 %.

In 2017, Scotch Whisky was still the main GI product in the UK in terms of sales value.

Comparison with 2010 sales value

The GI sales value increased by 33 % between 2010 and 2017, an AAGR of 4.2 %.

The increase amounted to EUR 1.9 billion, of which EUR 1.6 billion was related to PGI foodstuffs and EUR 0.3 billion was due to newly introduced spirit drinks. Sales of UK GI wines and of PDO agricultural products and foodstuffs declined.

Growth in PGI agri-food was mainly due to the development of new protected products and, to a lesser extent, the growth of existing PGIs designations produced under organic production.

Concerning existing protected designations, one can see slow growth for ciders and beers and, above all, a strong growth for fresh fish (notably Scottish Salmon).

New registered products appeared in all categories; the strongest performance was due to new fresh meat designations (beef and lamb). New products also appeared in processed meats, fruits and vegetables, bakers' wares and cheeses.

Whole exports in 2010 and 2017

Whole exports of GI products from the UK rose by 22 % between 2010 and 2017 (AAGR: 2.8 %).

As Scotch Whisky was the main GI product in the UK, export (intra-EU trade and exports to non-EU countries) was very important and grew a bit faster than production. Thus, spirit drinks exports value increased by 9 % from 2010 (-6 % in the EU market and +18 % in non-EU countries). The EU purchase value declined by 6 % and the UK national purchase value declined by 16 %. As a result, non-EU markets slightly increased their share in the UK GI spirit drinks sales value (92 % in 2010 versus 93 % in 2017).

Beyond the 'Scottish nectar', one can see a large increase in sales of agricultural products and foodstuffs out of the UK. This was worth EUR 582 million, with a 171 % growth between 2010 and 2017 (AAG: 15 %). As explained above, the fresh meats sector leads this growth movement together with the fresh fish sector. The weight of whole exports in agricultural and foods UK GI sales was 31 % in 2017 (compared to 26 % in 2010).

Weight in the EU GIs sales value

The UK's share of the total EU GI value reached 10 % in 2017, compared to 11 % in 2010. This decrease was due to a slower growth in the Scotch Whisky sales values. The rapid development of PGI food products was not important enough to compensate for the slow growth in GI spirit drinks sales.

G.6 Spain

Table 51 – Main figures for Spain

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	507 539	776 574	53%	101
AGRI-PGI	361 159	803 986	123%	91
AGRI-TOTAL	868 699	1 580 561	82%	192
WINE-PDO	3 419 175	4 202 795	23%	90
WINE-PGI	83 130	257 461	210%	41
WINE TOTAL	3 502 305	4 460 256	27%	131
SPIRIT DRINKS GI	206 852	125 515	-39%	19
TOTAL	4 577 855	6 166 332	35%	342

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	68 418	109 479	60%	37 174	102 277	175%
AGRI-PGI	18 708	19 030	2%	12 589	14 102	12%
AGRI-TOTAL	87 126	128 509	47%	49 763	116 378	134%
WINE-PDO	887 269	954 968	8%	322 863	636 288	97%
WINE-PGI	28 356	65 139	130%	9 041	21 434	137%
WINE TOTAL	915 625	1 020 107	11%	331 904	657 723	98%
SPIRIT DRINKS GI	14 225	15 295	8%	74 119	36 870	-50%
TOTAL	1 016 975	1 163 910	14%	455 786	810 971	78%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	5.8%	7.5%	29%	21%	27%	31%
AGRI-PGI	4.6%	5.5%	20%	9%	4%	-52%
AGRI-TOTAL	5.2%	6.3%	21%	16%	15%	-2%
WINE-PDO	13.5%	12.7%	-6%	35%	38%	7%
WINE-PGI	2.0%	4.1%	109%	45%	34%	-25%
WINE TOTAL	11.8%	11.3%	-4%	36%	38%	6%
SPIRIT DRINKS GI	2.5%	1.2%	-52%	43%	42%	-3%
TOTAL	8.4%	8.0%	-5%	32%	32%	0%

Source: AND International study for DG AGRI

Sales Value

In 2017, sales value under GIs was EUR 6.2 billion in Spain. All individual data on GIs are publicly available for Spain on the Ministry website ⁴⁵ ; that is why individual data are reported here and confidentiality rules do not apply.

Wine accounted for the largest share of the sales value in 2017 (72 % of total sales value), in particular wine under PDOs (68 %). The main PDOs were Rioja, Cava and Ribera del Duero. These three PDOs accounted for 51 % of the sales value of wine under PDOs in 2017. Wine under PGIs accounted for 4 % of the total sales value under GIs. The main PGIs were Castilla and Castilla y León. PDOs are considered as strategic for valorisation of wine in Spain, though this MS is also a large producer of wine without GIs.

The agri-food sector accounted for 26 % of total sales value in 2017: EUR 777 million for PDOs and EUR 804 million for PGIs.

For PDOs, the main sectors were cheese, fruits and vegetables, and oils and fats. The two main PDOs were Queso Manchego and Melocotón de Calanda. These two PDOs accounted for 30 % of the sales value for agri-food products under PDOs in 2017.

The main sector under PGIs was the fresh meats sector. This was thanks to PGI Ternera Gallega, which accounted for 27 % of the total sales value under PGIs in the agri-food sector in 2017.

Spirit drinks under GIs accounted for EUR 126 million in 2017 (2 % of sales value under GIs in Spain). The main GI was Brandy de Jerez, which accounted for 55 % of the total sales value (a total of 19 GIs were registered).

Comparison with 2010 sales value

Sales value grew by 35 % between 2010 and 2017 (an increase of EUR 1.6 billion). While wine and agri-food products increased by EUR 1.7 billion, the sales value of spirit drinks decreased by EUR 81 million. The increase of sales value for wine accounted for 60 % of the growth (an increase of EUR 958 million). The remaining growth was related to agri-food products under PDOs and PGIs. This was related to registration of new products and the growth in GIs already registered in 2010.

Whole exports in 2010 and 2017

Almost one third (32 %) of sales value was in export markets (both intra- and extra-EU trade). This reached EUR 2 billion in 2017 (+34 % compared to 2010). The orientation toward export was particularly high for spirit drinks (42 %), wine (38 %) and PDOs in the agri-food sector (27 %). The share of export for the agri-food sector under PGIs was 7 %.

Weight in the EU GIs sales value

Spain accounted for 8% of total sales value under GI in 2017. The weight of Spain was particularly high for wines under PDO (13%).

⁴⁵ <https://www.mapa.gob.es/es/alimentacion/temas/calidad-agroalimentaria/calidad-diferenciada/dop/htm/cifrasydatos.aspx>

G.7 Portugal

Table 52 – Main figures for Portugal

	Sales value (K EUR)			Nb products 2017
	2010	2017	Evol.2010/2017	
AGRI-PDO	69 987	124 527	78%	64
AGRI-PGI	2 731	40 833	1395%	72
AGRI-TOTAL	72 718	165 360	127%	136
WINE-PDO	851 846	1 210 305	42%	30
WINE-PGI	313 020	465 716	49%	10
WINE TOTAL	1 164 866	1 676 021	44%	40
SPIRIT DRINKS GI	3 687	5 601	52%	11
TOTAL	1 241 271	1 846 981	49%	187

	Export intra-EU (K EUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol.2010/2017	2010	2017	Evol.2010/2017
AGRI-PDO	29 487	50 798	72%	9 970	31 756	219%
AGRI-PGI	19	322	1608%	66	131	97%
AGRI-TOTAL	29 506	51 120	73%	10 037	31 887	218%
WINE-PDO	316 623	335 763	6%	145 801	201 571	38%
WINE-PGI	60 752	44 846	-26%	83 516	85 996	3%
WINE TOTAL	377 375	380 609	1%	229 317	287 568	25%
SPIRIT DRINKS GI	3	5	56%	12	19	62%
TOTAL	406 884	431 735	6%	239 365	319 473	33%

	% total EU value			% exports in the sales value		
	2010	2017	Evol.2010/2017	2010	2017	Evol.2010/2017
AGRI-PDO	0.8%	1.2%	48%	56%	66%	18%
AGRI-PGI	0.0%	0.3%	698%	3%	1%	-64%
AGRI-TOTAL	0.4%	0.7%	50%	54%	50%	-8%
WINE-PDO	3.4%	3.6%	9%	54%	44%	-18%
WINE-PGI	7.4%	7.4%	0%	46%	28%	-39%
WINE TOTAL	3.9%	4.2%	8%	52%	40%	-23%
SPIRIT DRINKS GI	0.0%	0.1%	21%	0%	0%	6%
TOTAL	2.3%	2.4%	5%	52%	41%	-22%

Source: AND International study for DG AGRI

Sales Value

Sales value reached EUR 1.8 billion in 2017. The main sector was wines under PDOs, this sector having important producing areas such as Alentejo and North. The second sector was wines under PGIs, the main denominations being PGI Alentejo and Lisboa. The wine sector accounted for 91 % of the total sales value under GIs in Portugal in 2017 (91 % for PDOs and 92 % for PGIs).

The agricultural products and foodstuffs under PDOs and PGIs were mainly composed of 'fruit, vegetables and cereals, fresh or processed'. They accounted for 70 % of sales value under PDO foods and for 60 % of sales value under PGI foods. Despite the important number of agricultural products and foodstuffs (64 PDO foods and 72 PGI foods), their share of the sales value remained low (9 % of the total).

Comparison with 2010 sales value

The total growth in the Portuguese GI sales value between 2010 and 2017 was 49 %.

Wine (PDO and PGI) contributed to 84 % of the growth value (EUR 511 million of EUR 606 million), with an increase of the unit price over the period: 3.31 EUR/l in 2010 and 3.82 EUR/l in 2017.

Whole exports in 2010 and 2017

Changes in export value were positive. Between the two periods, sales to the EU grew by 6 % and sales to non-EU countries grew by 33 %. All-destination growth was 16 %.

Most of whole exports were related to wine (89 % of the sales value for wine was in export markets). The exported value of PDO wine tended to increase both in intra-EU and extra-EU markets, whereas exported value decreased in the intra-EU market for PGI wine and there was a small increase in the extra-EU market.

For agri-food products, 11 % of the sales value in 2017 was for export markets (intra-EU trade and exports to non-EU countries). Sales were mainly intra-EU, and this grew by 73 % between 2010 and 2017.

Weight in the EU GIs sales value

The Portuguese share of the total EU GI market was 2.4 % in 2017, compared to 2.3 % in 2010. The weight of Portugal was higher for wines, which made up 4.2 % of the EU sales value.

G.8 The Netherlands

Table 53 – Main figures for the Netherlands

	Sales value (K EUR)			Nb products 2017
	2010	2017	Evol.2010/2017	
AGRI-PDO	92 620	346 694	274%	6
AGRI-PGI	220	1 217 263	553201%	5
AGRI-TOTAL	92 840	1 563 957	1585%	11
WINE-PDO	0	0	n/a	0
WINE-PGI	2 146	7 916	269%	12
WINE TOTAL	2 146	7 916	269%	12
SPIRIT DRINKS GI	9 708	4 944	-49%	5
TOTAL	104 694	1 576 817	1406%	28

	Export intra-EU (K EUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol.2010/2017	2010	2017	Evol.2010/2017
AGRI-PDO	25 602	120 853	372%	19	88	361%
AGRI-PGI	0	510 224	n/a	0	123 908	n/a
AGRI-TOTAL	25 602	631 077	2365%	19	123 996	652510%
WINE-PDO	0	0	n/a	0	0	n/a
WINE-PGI	0	0	n/a	0	0	n/a
WINE TOTAL	0	0	n/a	0	0	n/a
SPIRIT DRINKS GI	0	0	n/a	0	0	n/a
TOTAL	25 602	631 077	2365%	19	123 996	652510%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	1.1%	3.4%	216%	28%	35%	26%
AGRI-PGI	0.0%	8.3%	297989%	0%	52%	n/a
AGRI-TOTAL	0.6%	6.3%	1021%	28%	48%	75%
WINE-PDO	0.0%	0.0%	n/a	n/a	n/a	n/a
WINE-PGI	0.1%	0.1%	149%	0%	0%	n/a
WINE TOTAL	0.0%	0.0%	177%	0%	0%	n/a
SPIRIT DRINKS GI	0.1%	0.0%	-59%	0%	0%	n/a
TOTAL	0.2%	2.0%	964%	24%	48%	96%

Source: AND International study for DG AGRI

Sales Value

Sales value reached EUR 1.6 billion in 2017 (excluding TSGs). The main sector was agricultural products and foodstuffs (99 % of sales value), the main denominations being Gouda Holland (PGI), Hollandse geitenkaas (PGI) and Noord-Hollandse Gouda (PDO).

Comparison with 2010 sales value

The total growth in the Dutch GI sales value was 1 406 % between 2010 and 2017, mainly due to the registration of new GI cheeses.

PGI agricultural products and foodstuffs caused 83 % of the growth value (EUR 1.2 billion of EUR 1.5 billion) due to the registration of two PGI cheeses.

PDO agricultural products and foodstuffs caused 17 % of the growth value, with a strong increase in the volumes of PDO cheeses.

Whole exports in 2010 and 2017

Changes in export value were positive. Between the two periods, sales to the EU grew by 2 365 % and sales to non-EU countries, which were only EUR 19 000 in 2010, developed strongly and reached EUR 124 million in 2017. Whole exports grew by 2 847 %.

All exports were related to cheeses and increased both in intra- and extra-EU markets.

Weight in the EU GIs sales value

The Dutch market share of the total EU GI market was 2% in 2017, compared to 0.2% in 2010, thanks to the strong development of cheeses. Therefore, the weight of the Netherlands was higher for agricultural products and foodstuffs, which made up 6.3% of the EU sales value.

G.9 Austria

Table 54 – Main figures for Austria

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	95 718	98 556	3%	10
AGRI-PGI	43 478	98 020	125%	6
AGRI-TOTAL	139 196	196 576	41%	16
WINE-PDO	590 064	643 502	9%	26
WINE-PGI	20 989	23 347	11%	3
WINE TOTAL	611 054	666 849	9%	29
SPIRIT DRINKS GI	58 228	71 822	23%	9
TOTAL	808 477	935 247	16%	54

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	33 064	33 705	2%	9 153	549	-94%
AGRI-PGI	16 012	34 881	118%	1 218	1 125	-8%
AGRI-TOTAL	49 076	68 587	40%	10 371	1 674	-84%
WINE-PDO	70 080	97 819	40%	16 921	36 624	116%
WINE-PGI	2 527	3 528	40%	610	1 321	116%
WINE TOTAL	72 607	101 347	40%	17 532	37 945	116%
SPIRIT DRINKS GI	5 289	6 857	30%	528	685	30%
TOTAL	126 972	176 791	39%	28 431	40 303	42%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	1.1%	1.0%	-13%	44%	35%	-21%
AGRI-PGI	0.6%	0.7%	21%	40%	37%	-7%
AGRI-TOTAL	0.8%	0.8%	-6%	43%	36%	-16%
WINE-PDO	2.3%	1.9%	-16%	15%	21%	42%
WINE-PGI	0.5%	0.4%	-25%	15%	21%	39%
WINE TOTAL	2.1%	1.7%	-18%	15%	21%	42%
SPIRIT DRINKS GI	0.7%	0.7%	-2%	10%	11%	5%
TOTAL	1.5%	1.2%	-18%	19%	23%	21%

Source: AND International study for DG AGRI

Sales Value

Sales value reached EUR 984 million in 2017. The main sector was wine under PDOs, with important producing areas such as Burgenland and Lower Austria. The second sector was wine under PGIs, the main denominations being Steirerland and Weinland. The wine sector accounted for 68 % of the total sales value under GIs in Portugal in 2017.

PDO agricultural and food products accounted for 15 %, PGI foods for 10 % and spirit drinks for 7 %.

Within the main category (wine), the share of PDO wine is significant (96 %).

Comparison with 2010 sales value

Austrian GI sales value grew by 22 % between 2010 and 2017.

PGI foods caused 31 % of the growth value, PDO wines 30 % and PDO foods 29 %.

Whole exports in 2010 and 2017

Intra-EU trade increased by 56 %, and sales to non-EU countries grew by 77 %. Whole exports growth was 60 %.

This positive result was mainly due to an increase of 118 % of PGI food sales to the EU and an increase of 55 % of PDO wines sales (+40 % to the EU and +116 % to non-EU countries).

Weight in the EU GIs sales value

The Austrian market share of the total EU GI market was 1.24 % in 2017, compared to 1.48 % in 2010. This relative decline was due to the faster growth in the other MSs.

G.10 Greece

Table 55 – Main figures for Greece

	Sales value (kEUR)			
	2010	2017	Evol. 2010/2017	No products 2017
AGRI-PDO	743 168	903 033	22%	75
AGRI-PGI	10 041	20 543	105%	29
AGRI-TOTAL	753 209	923 576	23%	104
WINE-PDO	79 711	70 015	-12%	33
WINE-PGI	121 289	137 178	13%	114
WINE TOTAL	201 001	207 192	3%	147
SPIRIT DRINKS GI	66 679	64 493	-3%	16
TOTAL	1 020 888	1 195 261	17%	267

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	186 094	336 497	81%	39 848	69 035	73%
AGRI-PGI	507	2 045	304%	117	687	490%
AGRI-TOTAL	186 601	338 542	81%	39 964	69 722	74%
WINE-PDO	15 199	13 260	-13%	4 105	8 342	103%
WINE-PGI	12 061	16 608	38%	4 770	16 546	247%
WINE TOTAL	27 261	29 868	10%	8 875	24 888	180%
SPIRIT DRINKS GI	18 856	27 247	45%	6 004	11 134	85%
TOTAL	232 718	395 657	70%	54 843	105 744	93%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	8.5%	8.8%	3%	30%	45%	48%
AGRI-PGI	0.1%	0.1%	10%	6%	13%	114%
AGRI-TOTAL	4.5%	3.7%	-18%	30%	44%	47%
WINE-PDO	0.3%	0.2%	-33%	24%	31%	27%
WINE-PGI	2.9%	2.2%	-24%	14%	24%	74%
WINE TOTAL	0.7%	0.5%	-23%	18%	26%	47%
SPIRIT DRINKS GI	0.8%	0.6%	-23%	37%	60%	60%
TOTAL	1.9%	1.5%	-17%	28%	42%	49%

Source: AND International study for DG AGRI

Sales Value

The total Greek GI sales value for 2017 was EUR 1.17 billion. The number of protected products registered was 267 (compared to 252 in 2010).

The main GI category in Greece was PDO agricultural products and foodstuffs. This made up 77 % of the total. Wines (PDO and PGI) accounted for 18 % of the total, spirit drinks 3 % and PGI foods 2 %.

Within the main category (agricultural and food products), cheeses accounted for 90 % of the total sales value; notably, Feta producers experienced remarkable growth.

Comparison with 2010 sales value.

The total growth rate of the Greek GI sales value between 2010 and 2017 was 18 % (AAGR: 2.4 %).

PDO food products (cheeses and, among them, Feta) caused 90 % of the growth value (EUR 160 million of EUR 176 million).

The value of GI Greek wines increased only by 3 %. This was the result of opposite trends: a decrease for PDO wine (-12 %) and growth for PGI wines (+13 %).

Data about spirit drinks had been revised for the period 2005–2010. Between 2010 and 2017, spirit drinks sales value decreased by 3%.

Whole exports in 2010 and 2017

Changes in export value were very positive. Between the two years, sales to the EU grew by 70 % and sales to non-EU countries grew by 93 %. The all-destination growth rate reached 74 %.

This positive result was mainly due to agricultural and food products, especially cheeses; but wine exports also increased (by 10 % to the EU and by 180 % to non-EU countries).

Spirit drinks exports rose by 54 % between the two years; sales to non-EU countries grew faster (+85 %) than sales to EU countries (+45 %).

Thus, exports played a central role in the evolution of Greek GIs. The share of whole exports in total sales increased from 28 % in 2010 to 42 % in 2017.

In the same time, sales in the Greek national market decreased by 5 %.

Weight in the EU GIs sales value

The Greek market share of the total EU GI market represented 1.5 % in 2017, compared to 1.9 % in 2010. This relative decline was due to the faster growth in the other MSs.

In terms of the main product category (PDO agriculture and food products), the Greek market share remained stable (it grew by 0.1 points).

G.11 Ireland

Table 56 – Main figures for Ireland

	Sales value (K EUR)			
	2010	2017	Evol.2010/2017	Nb products 2017
AGRI-PDO	s	s	s	3
AGRI-PGI	16 026	1 309	-92%	4
AGRI-TOTAL	28 976	8 142	-72%	7
WINE-PDO	0	0	n/a	0
WINE-PGI	0	0	n/a	0
WINE TOTAL	0	0	n/a	0
SPIRIT DRINKS GI	578 362	983 323	70%	3
TOTAL	607 338	991 465	63%	10

	Export intra-EU (K EUR)			Export extra-EU (K EUR)		
	2010	2017	Evol.2010/2017	2010	2017	Evol.2010/2017
AGRI-PDO	s	s	s	s	s	s
AGRI-PGI	11 000	0	-100%	1 840	0	-100%
AGRI-TOTAL	23 950	6 723	-72%	1 840	37	-98%
WINE-PDO	0	0	n/a	0	0	n/a
WINE-PGI	0	0	n/a	0	0	n/a
WINE TOTAL	0	0	n/a	0	0	n/a
SPIRIT DRINKS GI	226 663	263 795	16%	322 697	684 370	112%
TOTAL	250 613	270 518	8%	324 537	684 407	111%

	% total EU value			% exports in the sales value		
	2010	2017	Evol.2010/2017	2010	2017	Evol.2010/2017
AGRI-PDO	s	s	s	s	s	s
AGRI-PGI	0.2%	0.0%	-96%	80%	0%	-100%
AGRI-TOTAL	0.2%	0.0%	-82%	89%	83%	-7%
WINE-PDO	0.0%	0.0%	n/a	n/a	n/a	n/a
WINE-PGI	0.0%	0.0%	n/a	n/a	n/a	n/a
WINE TOTAL	0.0%	0.0%	n/a	n/a	n/a	n/a
SPIRIT DRINKS GI	7.0%	9.5%	35%	95%	96%	2%
TOTAL	1.1%	1.3%	15%	95%	96%	2%

s: statistical secret

Source: AND International study for DG AGRI

Sales Value

Sales value reached EUR 991 million in 2017. The main sector was spirit drinks, the main denominations being Irish Cream and Irish Whisky. This sector accounted for 99 % of the total sales value under GIs in Ireland.

The agricultural products and foodstuffs sector under PDOs and PGIs only represented 1 % of the total sales value in 2017, with seven products.

Comparison with 2010 sales value

Irish GI sales value grew by 63 % between 2010 and 2017, thanks to the growth in spirit drinks sales volume. Prices declined over the same period.

There was a drop of sales value of agricultural products and foodstuffs (-72 %), due to a significant decrease of produced volumes.

Whole exports in 2010 and 2017

Intra-EU trade rose by 8 %, and sales to non-EU countries grew by 111 %. Whole exports increased by 66 %.

Most of whole exports were related to spirit drinks (96 % of the sales value for spirit drinks were in export markets). The exported value of spirit drinks tended to increase both in the intra-EU market (16 %), mainly to France, and the extra-EU market (111 %), mainly to the US and Singapore.

Weight in the EU GIs sales value

The Irish market share of the total EU GI market was 1.3 % in 2017, compared to 1.1 % in 2010. This growth was due to the spirit drinks sector. The Irish share was higher for spirit drinks, with 9.5 % of the EU sales value.

G.12 Czechia

Table 57 – Main figures for Czechia

	Sales value (K EUR)			Nb products 2017
	2010	2017	Evol.2010/2017	
AGRI-PDO	50 523	50 921	1%	6
AGRI-PGI	696 027	729 714	5%	23
AGRI-TOTAL	746 549	780 635	5%	29
WINE-PDO	39 914	144 376	262%	11
WINE-PGI	15 288	11 630	-24%	2
WINE TOTAL	55 202	156 006	183%	13
SPIRIT DRINKS GI	0	0	n/a	1
TOTAL	801 751	936 641	17%	43

	Export intra-EU (K EUR)			Export extra-EU (K EUR)		
	2010	2017	Evol.2010/2017	2010	2017	Evol.2010/2017
AGRI-PDO	10 453	10 658	2%	26 381	27 699	5%
AGRI-PGI	132 979	162 433	22%	26 148	30 182	15%
AGRI-TOTAL	143 432	173 090	21%	52 528	57 880	10%
WINE-PDO	3 904	3 733	-4%	46	370	701%
WINE-PGI	4 414	3 969	-10%	0	372	n/a
WINE TOTAL	8 318	7 702	-7%	46	742	1506%
SPIRIT DRINKS GI	0	0	n/a	0	0	n/a
TOTAL	151 750	180 793	19%	52 574	58 622	12%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	0.6%	0.5%	-15%	73%	75%	3%
AGRI-PGI	8.8%	5.0%	-44%	23%	26%	15%
AGRI-TOTAL	4.5%	3.1%	-30%	26%	30%	13%
WINE-PDO	0.2%	0.4%	177%	10%	3%	-71%
WINE-PGI	0.4%	0.2%	-49%	29%	37%	29%
WINE TOTAL	0.2%	0.4%	112%	15%	5%	-64%
SPIRIT DRINKS GI	0.0%	0.0%	n/a	n/a	n/a	n/a
TOTAL	1.5%	1.2%	-17%	25%	26%	0%

Source: AND International study for DG AGRI

Sales Value

The total GIs sales value for 2017 was EUR 937 million. The number of protected products (without TSG) was 43 (compared to 36 in 2010).

The largest categories of GIs in Czechia were PGI agricultural and food products. These made up 78 % of the total; wine (PDO and PGI) accounted for 17 %, and PDO agri-food for 5 %.

Within the main category (PGI foods), the share of beer was fundamental (92 %), České pivo and Českobudějovické pivo being the main beer GIs in terms of sales value.

Comparison with 2010 sales value

The total growth in the Czech GI sales value between 2010 and 2017 was 17 %.

PDO wines caused 77 % of the growth value (EUR 104 million of EUR 135 million). The rest of the growth was due to PGI foods.

Whole exports in 2010 and 2017

Intra-EU trade rose by 19 %, and sales to non-EU countries grew by 12 %. Whole exports increased by 17 %.

PGI foods, and especially beers, were the main export drivers.

Weight in the EU GIs sales value

The Czech market share of the total EU GI market was 1.2 % in 2017, compared to 1.5 % in 2010. This relative decline was due to the faster growth in the other MSs.

Concerning the main product category (PGI agriculture and food products), the Czech market share decreased by 3.9 percentage points.

G.13 Poland

Table 58 – Main figures in Poland

	Sales value (K EUR)			Nb products 2017
	2010	2017	Evol.2010/2017	
AGRI-PDO	891	18 119	1933%	9
AGRI-PGI	6 753	90 601	1242%	20
AGRI-TOTAL	7 644	108 720	1322%	29
WINE-PDO	0	0	n/a	0
WINE-PGI	0	0	n/a	0
WINE TOTAL	0	0	n/a	0
SPIRIT DRINKS GI	317 723	324 735	2%	3
TOTAL excluding TSG	325 367	433 456	33%	32

	Intra EU trade (kEUR)			Exports to non-EU countries (kEUR)		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	0	0	n/a	0	0	n/a
AGRI-PGI	404	10 325	2455%	0	2 397	n/a
AGRI-TOTAL	404	10 325	2455%	0	2 397	n/a
WINE-PDO	0	0	n/a	0	0	n/a
WINE-PGI	0	0	n/a	0	0	n/a
WINE TOTAL	0	0	n/a	0	0	n/a
SPIRIT DRINKS GI	52 965	106 077	100%	95 780	44 659	-53%
TOTAL	53 369	116 402	118%	95 780	47 057	-51%

	% total EU value			% exports in the sales value		
	2010	2017	Evol. 2010/2017	2010	2017	Evol. 2010/2017
AGRI-PDO	0.0%	0.2%	1619%	0%	0%	n/a
AGRI-PGI	0.1%	0.6%	623%	6%	14%	135%
AGRI-TOTAL	0.0%	0.4%	846%	5%	12%	121%
WINE-PDO	0.0%	0.0%	n/a	n/a	n/a	n/a
WINE-PGI	0.0%	0.0%	n/a	n/a	n/a	n/a
WINE TOTAL	0.0%	0.0%	n/a	n/a	n/a	n/a
SPIRIT DRINKS GI	3.9%	3.1%	-19%	47%	46%	-1%
TOTAL	0.6%	0.6%	-6%	46%	38%	-18%

Source: AND International study for DG AGRI

Sales Value

The total GI sales value (without TSGs) for 2017 was EUR 433 million. The nine TSG products represented a total sales value of EUR 390 million. The following analysis is focused on GI products only (without taking TSG products into account).

The main sector was spirit drinks, the main denominations being 'Herbal vodka from the North Podlasie Lowland aromatised with an extract of bison grass' and 'Polish vodka'. The spirit drinks sector accounted for 75 % of the total sales value under GIs in Poland in 2017.

The agricultural products and foodstuffs under PDOs and PGIs were mainly composed of PGI meat products (the main class being 'Preparations of pork') and PDO fruit, vegetables and cereals, fresh or processed (the main denomination being 'Jabłka grójeckie'). Despite the relatively important number of agricultural products and foodstuffs (9 PDO foods, and 20 PGI foods), their share of the sales value was only 25 %.

Comparison with 2010 sales value

The total growth in Polish GI sales value was 33 % between 2010 and 2017.

PGI foods contributed 78 % of the growth value (EUR 84 million versus EUR 108 million) thanks to the registration of 15 new products; these were mainly meat products.

Whole exports in 2010 and 2017

Between the two periods, sales to the EU grew by 20 % and sales to non-EU countries grew by 4 %. All-destination growth is 10 %.

Most whole exports were related to spirit drinks, which made up 92 % of whole exports total sales. Moreover, 46 % of the sales value for spirit drinks was in export markets. The exported value of spirit drinks tended to increase both in intra-EU and extra-EU markets.

Even if their share of the total export sales was low (8 %), PGI foods represented 86 % of the increase in sales value between 2010 and 2017 (EUR 12 million compared to EUR 14 million). Sales were mainly developed intra-EU.

Weight in the EU GIs sales value

The Polish market share of the total EU GI market remained stable between 2010 and 2017 (0.6 %). The contribution of Poland was higher for spirit drinks, with 3.1% of the EU sales value.

G.14 Other Member States

In 2017, the remaining 16 MSs (Hungary, Slovenia, Bulgaria, Sweden, Romania, Denmark, Croatia, Malta, Slovakia, Belgium, Luxembourg, Finland, Cyprus, Lithuania, Estonia and Latvia) represented 2.2 % of total EU28 sales value with 385 GI products (excluding TSG products), of which 208 wine products accounted for 63 % of total sales value.

Countries contributing between EUR 400 million and EUR 100 million: Hungary, Sweden, Slovenia, Romania, Denmark, Croatia, Bulgaria

In Hungary, Bulgaria, Croatia, Slovenia and Romania, the main GI sector was wine (PDO and PGI), which accounted for, respectively, 76 %, 80 %, 86 %, 88 % and 99 % of total GI sales.

In Sweden, the main GI sector was spirit drinks, accounting for 78 % of total GI sales.

In Denmark, the main GI sector was PGI foods, which accounted for 99.8 % of total GI sales.

Countries contributing less than EUR 100 million: Slovakia, Belgium, Malta, Luxembourg, Finland, Cyprus, Lithuania, Estonia, Latvia

In Cyprus, Luxembourg, Slovakia and Malta, the main GI sector was wine (PDO and PGI), which accounted for, respectively, 79 %, 80 %, 85 % and 100 % of total GI sales.

In Belgium, Finland and Latvia, the main GI sector was agricultural products and foodstuffs (PDO and PGI), which accounted for 49 %, 99 % and 100 %, respectively, of total GI sales.

In Lithuania and Estonia, the main GI sector was spirit drinks, which accounted for 68 % and 100 %, respectively, of total GI sales.

H. SPECIFIC ANALYSIS FOR THE UNITED-KINGDOM

The importance of the UK in the EU28 GI economy can be analysed according to:

- the importance of UK sales to the 27 other MSs;
- the importance of UK sales;
- the importance of sales of the EU 27 to the UK.

The first two situations are described in the section G.5.

Table 59 : EU 27 sales to the UK, excluding TSGs, in million EUR

Type of products	2011	% sales to UK / total intra EU sales	2017	% sales to UK / total intra EU sales	Evol. 2010/2017
Agricultural products and foodstuffs	261.1	9%	334.5	8%	28%
Aromatised wine	-	0%	-	0%	-
Spirits	197.1	8%	161.9	7%	-18%
Wine	1 699.0	27%	1 886.7	24%	11%
Total	2 157.3	18%	2 383.1	16%	10%

Source: AND International study for DG AGRI

Sales to the UK represented 16 % of intra-EU sales in 2017, with EUR 2 383.1 million imported by the UK. This is an important increase on the 2011 level (+ 10 %). The increase was mainly the consequence of the progression of agri-food products imports (+28%) and wines imports (+11%); and occurred in spite of a decline in UE27 spirits sales to the UK (-11%).

The share of UE 27 sales to the UK fell to 16 % (vs 18% in 2011). The balance remains positive for the EU 27 with a total purchase from the UK at EUR 2 151 million, against sales worth EUR 2 383 million in 2017.

Agricultural products and foodstuffs

Table 60 : EU 27 sales of agri-food products to the UK, 2017, excluding TSGs, in million EUR

	2011	% of agri-food products 2011	2017	% of agri-food products 2017	Evol. 2010/2017
Cheeses	148.1	57%	200.2	60%	35.2%
Meat products (cooked, salted, smoked, etc.)	42.1	16%	49.6	15%	17.9%
Other products of Annex I of the Treaty (spices etc.)	17.7	7%	24.0	7%	35.9%
Beers	27.3	10%	17.0	5%	-37.7%
Fruit, vegetables and cereals fresh or processed	16.7	6%	22.4	7%	34.5%
Oils and fats (butter, margarine, etc.)	6.3	2%	13.7	4%	118.9%
Other	2.9	1%	7.4	2%	150.5%
Total	261.0	100%	334.5	100%	28.1%

Source: AND International study for DG AGRI

The sales of agri-food products to the UK reached EUR 334.5 million in 2017, up from EUR 261 million in 2011. This increase is mainly the consequence of the progression of cheeses (+35 % since 2011) and meat products (+18%). The main GI products purchased by the UK were cheeses, meat products and other types of products as defined in Annex I of the Treaty.

Among the most popular cheeses sold to the UK in 2017, Parmigiano Reggiano, Feta, Grana Padano and Mozzarella di Bufala Campana accounted together for 77% of the EU-27 sales of cheese to the UK. In 2011, this rate was at 83%.

In 2017, the main EU meat products sold to the UK were Prosciutto di Parma Schwarzwälder Schinken, Nürnberger Bratwürste / Nürnberger Rostbratwürste, and Mortadella Bologna. Together, they represented 73% of the total UK purchases of GI/TSG meat products from the EU27.

Cheeses and meat products sales to the UK underline the importance of the three main agri-food product supplier to the UK: Italy, Greece and Germany.

Table 61 : EU27 agri-food products sales to the UK, by MS, excluding TSGs, in million EUR

	2011				2017			
	PDO	PGI	Total	%	PDO	PGI	Total	%
ITALY	131.9	18.2	150.0	57%	141.5	24.6	166.2	50%
GREECE	27.0	-	27.0	10%	55.0	-	55.0	16%
GERMANY	-	33.7	33.7	13%	-	35.7	35.7	11%
FRANCE	13.1	5.1	18.1	7%	20.4	5.4	25.8	8%
PORTUGAL	4.4	-	4.4	2%	13.5	0.0	13.5	4%
SPAIN	5.6	3.2	8.8	3%	10.3	2.6	12.9	4%
NETHERLANDS	1.0	0.8	1.7	1%	3.4	6.8	10.2	3%
OTHER	0.5	16.7	17.2	7%	1.0	14.3	15.3	5%
Total	183.5	77.6	261.0	100%	245.1	89.4	334.5	100%

Source: AND International study for DG AGRI

In 2017, Italy, Greece and Germany accounted for 77 % of the EU 27 agri-food sales to the UK, with EUR 256.9 million of sales. The three MS accounted for 80 % of the sales to the UK in 2011, with EUR 210.7 million. Only Greek products increased their share in the total of EU 27 sales, because of the increase of the Feta in the total cheeses sales to the UK: 17 % in 2011 to 27 % in 2017.

Wines

Table 62 : EU 27 sales of wines to the UK, in million EUR

	2011				2017			
	PDO	PGI	Total	%	PDO	PGI	Total	%
FRANCE	1 018.2	141.4	1 159.5	68%	783.6	126.6	910.2	48%
ITALY	1 71.8	17.3	1 89.1	11%	603.6	13.5	617.1	33%
SPAIN	258.9	4.2	263.1	15%	254.8	13.7	268.4	14%
PORTUGAL	46.1	0.9	47.0	3%	56.8	5.4	62.2	3%
GERMANY	26.2	0.1	26.4	2%	13.5	0.1	13.6	1%
OTHER	10.6	3.3	13.9	1%	10.7	4.6	15.2	1%
Total	1 531.8	167.2	1 699.0	100%	1 723	163.80	1 886.7	100%

Source: AND International study for DG AGRI

The sales of EU 27 wines to the UK increased by 11 % between 2011 and 2017. In 2017, the main wine suppliers for the UK were France, Italy and Spain, accounting together for 95 % of the EU 27 sale value. French wines sold to the UK have declined by 249 million EUR (-22%) between 2011 and 2017. According to EU trade data (COMEXT), the value of the French wines sold to the UK declined for the main products: Champagne (-23%), Bordeaux (-43%), Languedoc (-18%) and Burgundy (2%). However, the share of each French vineyard in these sales remained almost stable between 2011 and 2017.

Table 63 : French wines sales to the UK, in million EUR

Vineyards	2011	% of wines 2011	2017	% of wines 2017	Evol. 2011/2017
Champagne	427.1	37%	328.1	36%	-23%
Bordeaux	316.6	27%	180.2	20%	-43%
Burgundy	128.0	11%	125.1	14%	-2%
Languedoc	136.0	12%	112.1	12%	-18%
Others	151.8	13%	164.7	18%	8%
Total	1 159.5	100%	910.2	100%	-22%

Source: AND International study for DG AGRI, COMEXT

On the other hand, Italian wines sold to the UK have increased by 226 %, reaching 617 million EUR. This important progression was the consequence of the rising in Prosecco consumption in the UK. The famous Italian sparkling wine (Prosecco) increased its sales to the UK by 902 %, accounting for more than the half of the Italian value of sales to the UK in 2017.

Spirits

Table 64 : EU 27 sales of spirits to the UK, in million EUR

	2011		2017		Evol. 2010/2017
FRANCE	122.7	62%	101.2	63%	-18%
IRELAND	59.9	30%	38.9	24%	-35%
OTHER	14.6	7%	21.7	13%	49%
Total	197.2	100%	161.9	100%	-18%

Source: AND International study for DG AGRI, COMEXT

UK imports of spirits from the EU 27 has decreased by 18 % between 2011 and 2017. This erosion in the value of GIs purchased by the UK is mainly due to the decline of imports from France and Ireland.

In 2017, the main supplier of spirits to the UK was France, accounting for 63 % of the total spirit value sold to the UK. The position of France in the UK spirit supply remained steady over the period in question but declined in term of value (-18%). This erosion of the total value of French spirits sent to the UK is the consequence of the removal of spirit drinks based on the update of the annex III of Regulation (EC) No 110/2008 on GIs in the spirit drinks sectors (see section A.2). In particular, Brandy français/Brandy de France, was removed from the database in 2016; this accounted in 2011 for 26 % of the French Spirit sales to the UK.

In 2017, France remained the first exporter of spirits to the UK through the sales of Cognac. From 2011 to 2017, the proportion of Cognac in the spirit sales to the UK raised to 59 %, as a consequence of the removal of 87 spirit drinks in the register, including Brandy français/Brandy de France. Cognac sales increased by 11 % to reach 95.5 million EUR.

Ireland ranks second with a contribution of 24 % of spirits imports by the UK. This share has declined by 6 percentage points since 2011 and the total Irish spirits sales to the UK has decreased by 35%. Irish Poteen/Irish Poitín, Irish Cream and Irish Whisky are protected designations shared between Ireland and the UK, through Northern Ireland.

Among the other UE 27 spirits purchased by the UK, we can find: Korn/Kornbrand (Germany), Polish vodka (Poland), Brandy de Jerez (Spain) three French Rums (France) and Armagnac (France).

CHAPTER 3: PRICE PREMIUM AND VALUE PREMIUM FOR GI/TSG PRODUCTS

I. METHOD: COMPARISON WITH SIMILAR PRODUCTS WITHOUT GI/TSG

This section presents an analysis of the value premium and the value premium rate of GI/TSG products compared to non-GI products⁴⁶. In this section, premium value and premium rates are obtained for GI and TSG products, combined. TSGs, however, do not affect sectorial statistics as they only concern agricultural products and foodstuffs. Where reference is given in the report to GIs for agricultural products and foodstuffs, TSGs are also being covered.

To perform this analysis, a two-step approach is followed. Firstly, the price of each GI/TSG product is matched to the price of a similar product without a GI/TSG label (i.e. standard products). Subsequently, the value premium and the value premium rate are obtained by comparing the sales value of GI/TSG products with the sales volume of GI/TSG products valued at the price of standard products. This volume-weighted aggregation takes into account the weight of the different sectors and the MS.

The price premium is calculated as follows.

- Value premium = $\sum (\text{GI volume} \times \text{GI price}) - \sum (\text{GI volume} \times \text{non GI price})$
- Value premium rate = $\sum (\text{GI volume} \times \text{GI price}) / \sum (\text{GI volume} \times \text{non GI price})$

The analysis is based on prices for 2017 at ex-factory, wholesale stage. Prices of GI/TSG products were obtained through multiple sources: surveys, interviews and desk research. The prices of wine and spirit drinks are based on the price per bottle/per hectolitre (hl).

Standard prices for non-GI/TSG products were *obtained from public statistics available at both EU and national levels. Prices obtained through European data sources were complemented with prices from national statistics:*

- EU sources – Eurostat, Comext, PRODCOM, DG AGRI;
- National sources – ISMEA (Italy), Department for Environment, Food & Rural Affairs (UK), FranceAgriMer (France), Observatorio de Precios de los Alimentos (Spain), Réseau des Nouvelles des Marchés (France), Mercamadrid (Spain).

For agricultural products and foodstuffs, a standard price was sought for each kind of product (cured ham, hard cheese, apples, etc.). In the wine sector, one reference price for non-GI/TSG wine was estimated in each MS. In the spirit drinks sector, we used seven PRODCOM spirit drinks classes to obtain standard prices (prices for non-GI/TSG products): whisky, vodka, gin and Geneva, rum, spirit drinks distilled from fruit, spirit drinks obtained from distilled grape wine and other spirit drinks. In cases where a reference for standard prices was not available, the value premium was estimated based on the price difference (between a GI/TSG product and a standard product) for comparable GI/TSG products in the MS or in a neighbouring MS.

The value premium does not reflect the value added and/or profitability of GI/TSG schemes, as it does not consider the economic impact of compliance with GI/TSG specifications. For instance, if prices of GI/TSG products are higher compared to their non-GI/TSG counterparts, producers involved in GI/TSG schemes may also

have additional costs and foregone earnings due to, for instance, limited yields in wine production, less productive species or varieties at agricultural stage, longer ripening in cheese production, longer curing for meat products, and so on.

J. VALUE PREMIUM IN THE EU28

J.1 Value premium by scheme

The average value premium rate for GI products in the EU28 is estimated at 2.07, down from 2.14 in 2010. This value premium rate indicates that the sales value of GI products was on average (weighted) 2.07 times higher than the sales value for comparable standard products without a GI label. If TSG products are omitted from the calculations, the global premium rate stands at 2.11 in 2017.

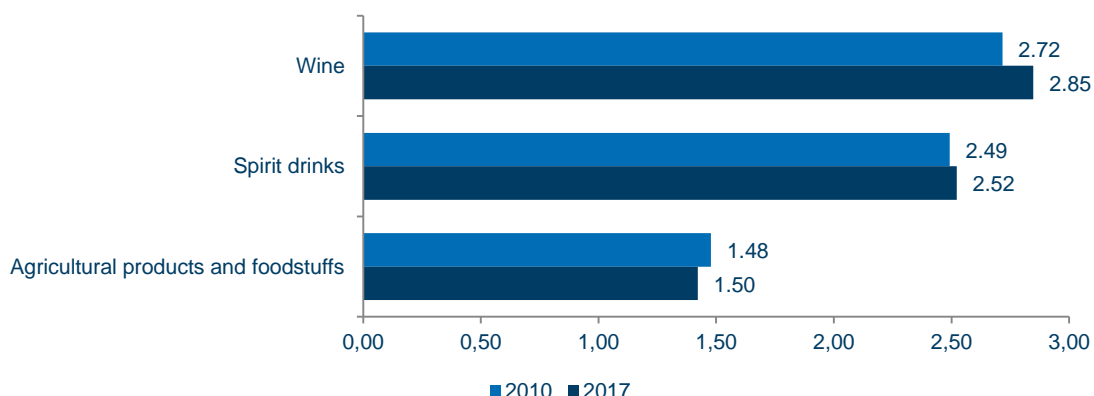
In this section, we distinguish between three main schemes for GI/TSG products: wines, spirit drinks and agricultural products and foodstuffs. A comparison of the average value premium rates across the three schemes shows that both GI wines and GI spirit drinks received much higher prices than the related standard products.

Agricultural products and foodstuffs recorded an economic value that was on average 1.42 times higher than the related standard products in 2017 (Figure 45).

Between 2010 and 2017, the sales volume under the wine scheme saw its premium rate increase by 0.13 points, whereas the rate for spirit drinks gained by 0.03 points and the rate for agricultural products and foodstuffs dropped by 0.06 points. The value premium rate increase for wine and spirit drinks did not prevent the overall weighted average of the value premium rate from declining slightly. This is explained by the total sales value of agri-food products, which grew much faster (+66 %) than the other categories (+25 % for spirit drinks and +33 % for wine). Agri-food sales volumes also grew faster than their value premium, which reduced their value premium rate.

These marginal changes demonstrate that, despite the growth in the number of GIs and their sales value, the price premium is a structural characteristic of GI products.

Figure 45 - Value premium rate in the EU28 by scheme (2010 and 2017)

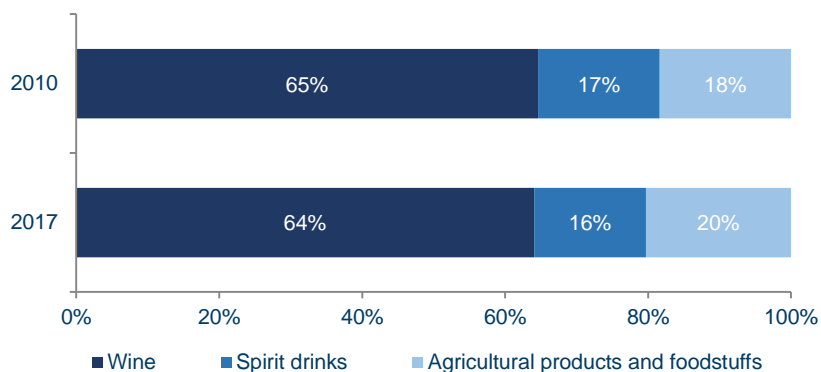


Source: AND International study for DG Agri

The total value premium of the EU28 GI/TSG production is estimated at EUR 39.9 billion for 2017. Wines accounted for 64 % of the value premium (EUR 25.6 billion), agricultural products and foodstuffs for 20 % (EUR 8.1 billion) and spirit drinks for 16 % (EUR 6.2 billion). The large contribution of wines to this value is due to its relative importance in terms of sales volume. The contribution of the three

schemes to the total value premium is presented in Figure 46. The share of the different schemes to the overall value premium has remained more or less the same in 2010 and 2017.

Figure 46 - Share of the value premium by scheme, 2010 and 2017 (%)

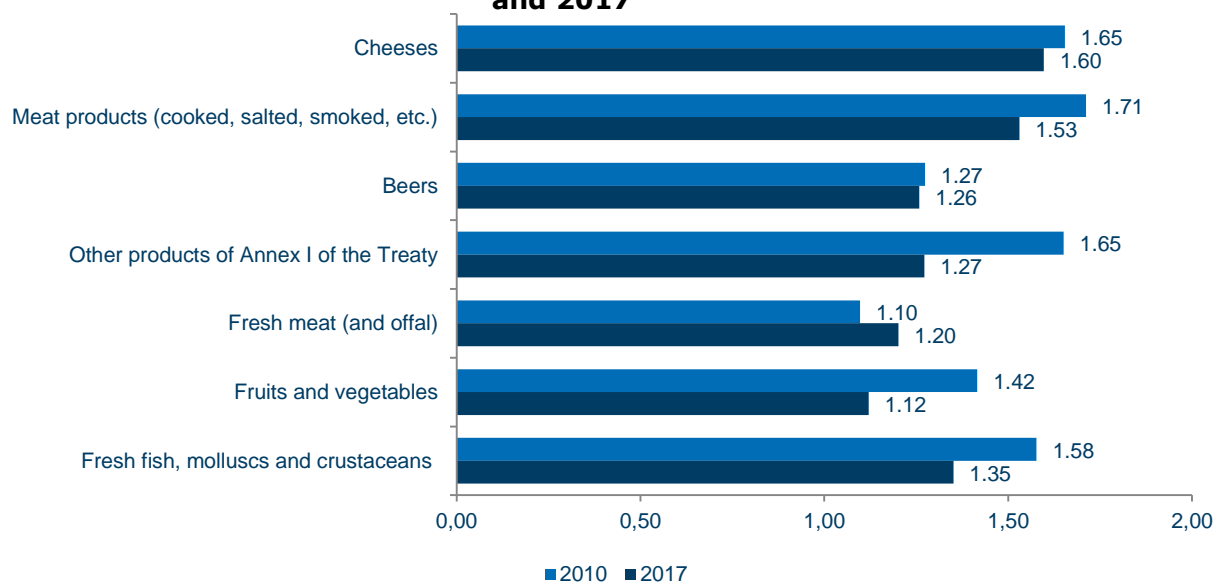


Source: AND International study for DG Agri

J.2 Value premium rates by class of agricultural products and foodstuffs

For agricultural products and foodstuffs, the value premium rates of the main classes (accounting for 92 % of the total value premium)⁴⁷ are shown in Figure 47.

Figure 47- Value premium rate for agricultural products and foodstuffs, 2010 and 2017



Source: AND International study for DG Agri

The value premium rate was higher for processed and more refined products than for raw and/or fresh products. The higher value premium rate can be explained by the fact that processing creates additional value to the product through differentiation (e.g. due to presentation, taste, etc.) and at the same time raises production costs.

⁴⁷ The other product classes (bread, pastry; oils and fats; fresh fish; pasta; natural mineral waters and spring waters; other products of animal origin; hay; salt; prepared meals; natural gums and resins; essential oils; mustard paste; and aromatised wine products) accounted for 8 % of the EU sales value.

Processed products

- Cheese and meat products contributed most to the agricultural products and foodstuffs sales value in the EU (33 % and 20 %, respectively). Cheese products had the highest value premium rate at 1.60, followed by meat products with a rate of 1.53.
- Other products of Annex I to the Treaty (spices, etc.) accounted for 3 % of the sales value within agricultural products and foodstuffs. The sales volume in 2017 more than doubled compared to the sales volume in 2010. The value premium rate was 1.27 in 2017.
- Brewing made up 12 % of the agricultural products and foodstuffs sales value under GIs at EU level and recorded a value premium rate of 1.26 in 2017.
- In 2010, olive oil was one of the products with the highest value premium rates (1.83); in 2017, it reduced to 1.04. This change was caused by a regular and important rise in the standard prices of virgin olive oil, according to DG AGRI data.
- The premium rate of the 'Fruit, vegetable and cereals, processed or not' category fell from 1.42 to 1.12. This is due to a general rise in fruit and vegetable prices between 2010 and 2017, which implied a reduction of the premium.
- The same phenomenon occurred in the seafood sector, where the premium rate dropped from 1.58 to 1.35.

Other fresh products

In 2017, the fresh meats sector contributed 11 % of the EU sales value in the agricultural products and foodstuffs scheme and had a value premium rate of 1.20 (versus 1.10 in 2010).

Table 65 shows some examples of specific product categories. Cells marked in grey illustrate an increase in the value premium rate for the respective products in 2017.

Table 65 - Value premium rate of product classes of minor importance in the EU28 sales value, 2010 and 2017

Product category	Value premium rate	
	2010	2017
Salt	n/a	22.3
Mustard paste	1.35	17.93 ⁴⁸
Essential oils	7.81	14.95 ⁴⁹
Natural gums and resins	6.42	8.23
Prepared meals	n/a	2.52
Hay	1.47	2.50
Pasta	1.25	2.36

⁴⁸ The Mustard paste category is made of two product names in 2017. Its average premium rate was strongly affected by the registration of a German Mustard paste name between 2010 and 2017.

⁴⁹ The Essential oils category is made of four product names in 2017. Its average premium rate was strongly affected by the registration of a Bulgarian Essential oil product name between 2010 and 2017.

Bread, pastry, cakes, confectionary, biscuits and other bakers' wares	2.63	2.28
Other products of animal origin (eggs, honey, various dairy products except butter, etc.)	1.87	2.02
Oils and fats (butter, margarine, etc.)	1.45	1.06
Aromatised wine products	0.08	0.19

Source: AND International study for DG Agri

In 2017, the value premium rates for the different GI products of minor importance were very heterogeneous, with values ranging from 0.19 (aromatised wine products, for which a limited quantity of GI products exist in the shadow of worldwide brands) to 17.93 (mustard paste, for which a German GI sells a premium product locally, as opposed to the products of industrial production, often sold under discounters' private labels). French salt also fetches a high premium rate (22.3). Nevertheless, the sales value of these classes, and for gums and resins, is very limited (covering only 0.4 % to 2.1 % of total EU sales) and thus have no impact on overall trends. The following sections offer comparison of value premium rates by sector and across MSs.

J.2.1 Cheese: 33% of the EU28 GI foodstuffs sales value of agri-food products and foodstuffs; value premium rate of 1,60

Italy, France and the Netherlands accounted for the largest share of the EU sales value in the cheese sector (82 %) in 2017. Between 2010 and 2017, Greece saw its share of GI cheese value fall from 11 % to 9 % of EU GI cheese sales.

In 2017, Italian cheeses recorded the highest share of sales value (44 %), although showing a reduction compared to 2010 (54 %). Similarly, the value premium rate reduced from 1.80 in 2010 to 1.67 in 2017. Italian GI cheeses were mostly cow cheese with hard cow cheese having the highest premium rate at 1.86.

France was the second-ranked MS in terms of GI sales value in the cheese sector, accounting for 21 % of EU sales under GIs. The French cheese value premium rate was 1.91, and hard cow cheese accounted for the largest part of French GI cheese (58 % in terms of sales value with a value premium of 1.98). Goat cheese had the highest premium rate value, with hard goat cheese and soft goat cheese reporting a premium rate of 3.42 and 3.14, respectively.

Finally, the Netherlands accounted for 17 % of the total sales value in the GI cheese sector, compared to the 1 % observed in 2010. Dutch GI cheese was mostly hard cow cheese, which accounted for 84 % of Dutch sales value in the GI cheese sector. The value premium of hard cow cheese was 1.28, whereas soft goat cheese had the highest price premium (3.03).

J.2.2 Meat products: 20% of the EU28 sales value of agri-food products and foodstuffs; value premium rate of 1.53

Italy, Germany and Spain accounted for 80 % of the total sales value in the GI meat products sector. Pork cured ham was the family product accounting for the largest part of EU total sales (51 %), with an average value premium rate of 2.18 across the three countries. France was the third-ranked MS in 2010, but was overtaken by Spain in 2017, having experienced a reduction in sales share (from 11 % in 2010 to 8 % in 2017).

Italy ranked first in terms of sales share in the GI meats sector, although it saw a reduction (from 59 % to 39 %) compared to 2010. The price premium of Italian meat products was 1.62 (pork ham: 1.57).

Germany represented the second-ranked MS in the meats sector under GIs, accounting for 22 % of EU value in terms of total sales. Pork ham was the main product category (42 % of German total sales in the processed meats sector), followed by other cooked meat products (29 %). The German value premium rate was 1.97, and pork ham was the product category reporting the highest price premium (3.90), thanks to a standard product with a much lower price in Germany than in other countries (source: PRODCOM).

Due to the remarkable increase in its share of GI processed meat sales (from 5 % to 20 %), Spain became the Member State accounting for the third-largest share of EU sales value, with a value premium rate of 1.09. Pork cured ham (value premium equal to 1.08) accounted for 98 % of Spanish total sales in the sector, while the highest value premium was reported by other cured meat products (1.66).

J.2.3 Beers: 12% of the EU28 total sales value; value premium rate of 1.26

Germany was the leading MS producing beers under GIs (79 % of total sales in the beer sector), followed by Czechia (20 %), with a value premium of 1.47 and 0.79, respectively. The Czech rate is explained by the fact that the main GI Czech beer is a very popular and medium/low-end product.

The highest value premium rate was observed in the UK (3.13), followed by Belgium (2.49), although the overall sales share of the two countries only accounted for about 1.3 % of the EU sales volume under GIs.

J.2.4 Fresh meats and offal: 11% of EU28 the total sales value; value premium rate of 1.20

France and the UK accounted for 81 % of the EU total sales value of fresh meat under GIs. Table 69 shows the value premium rates for the two countries in 2010 and 2017.

The UK ranked first, representing 56 % of total sales in the sector. The value premium rate in the UK for fresh meat was 1.19, with bovine and lamb representing the two main products (74 % and 25 % of total sales in the sector, respectively). There was a low premium rate for beef (1.1), that reflected the use of GI as a collective brand, mainly for exports to non-EU countries. The volume of GI poultry meat in the UK is limited; this can explain the high value premium rate, driven by a few specific products.

France was the second-ranked MS, representing 25 % of total sales value of fresh meat under GIs. The value premium in France was 1.75. Poultry was the main family product, accounting for 84 % of the French sales value and with a premium rate of 2.2. The French 'Poulet Fermier Label Rouge' is a locally well-known category created 50 years ago, and since then its premium rate has been constant.

Table 66 - Value premium rates in the fresh meat sector

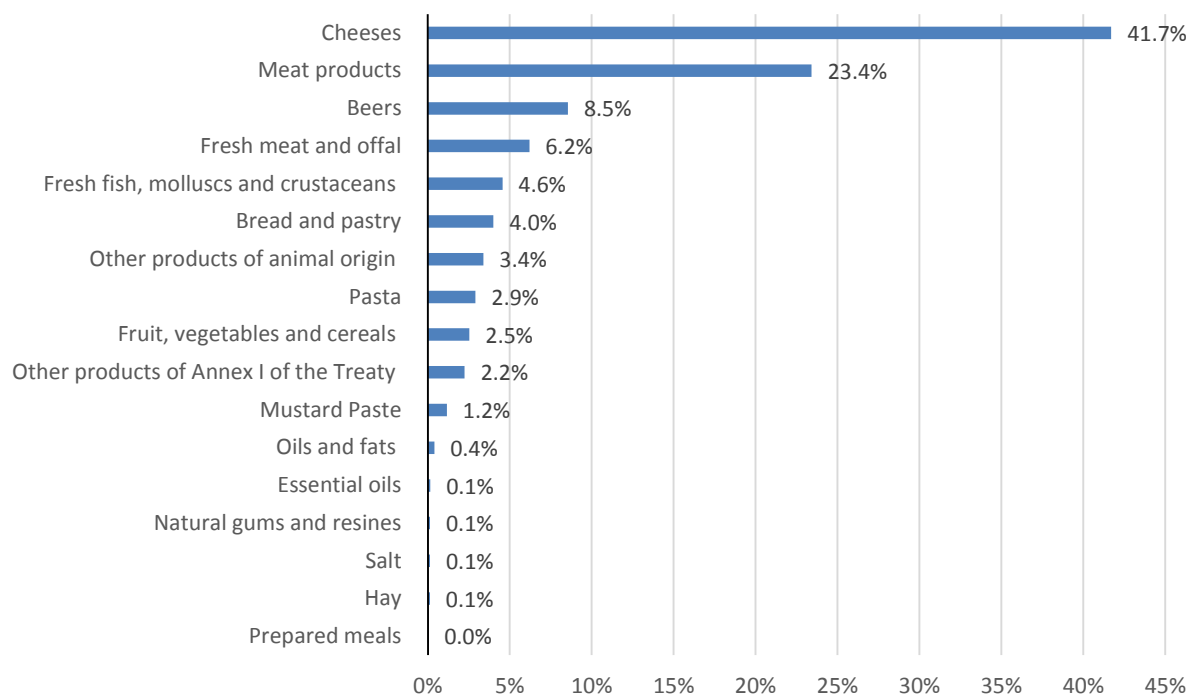
Value Premium			
		2010	2017
France	Poultry	1.9	2.2
	Pigs	1.2	1.4
	Bovines	1.4	0.9
	Lambs	0.8	0.9
United Kingdom	Poultry	n/a	5.1
	Pigs	n/a	1.5
	Bovines	1.0	1.1
	Lambs	1.0	1.5

Source: AND International study for DG Agri

J.2.5 Distribution of the value premium in the EU28 in the agricultural products and foodstuffs sector

In the total value premium of agricultural products and foodstuffs (EUR 8.09 billion), the main sectors were cheese (EUR 3.4 billion; 42 %); meat products (EUR 1.9 billion; 23 %) and beer (EUR 692 million; 9 %).

Figure 48 - Value premium per category in the agricultural products and foodstuffs scheme (% of EU28 value premium)



Source: AND International study for DG Agri

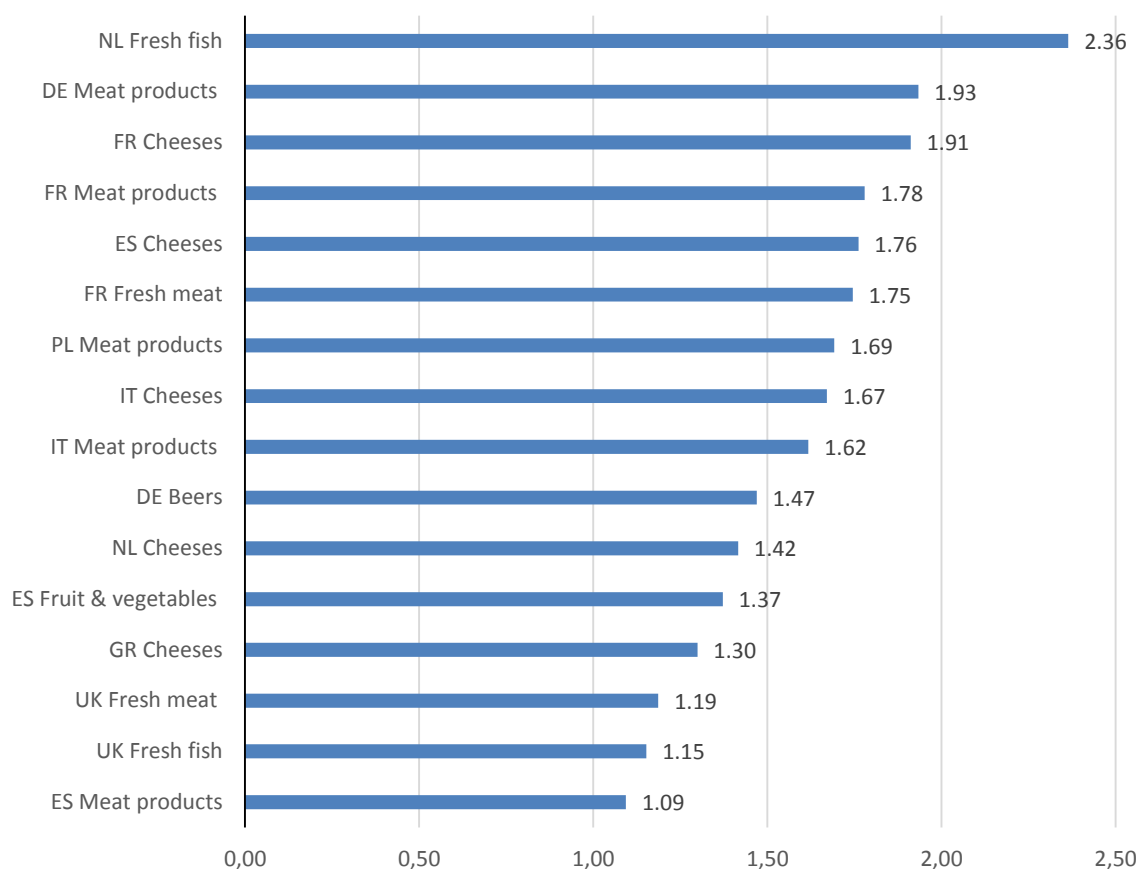
Cheeses and meat products alone account for about 64 % of the value premium within the agricultural products and foodstuffs scheme. Together, they were responsible for more than half of the total sales value (53 %).

French and Italian cheeses contributed the most to the EU-wide agri-food value premium, ranking 3rd and 8th in terms of value premium rate (1.91 and 1.67, respectively). Thus, the value of GI cheeses was 91 % higher in France and 67 % higher in Italy compared to the value of related standard products.

The German beer sector ranked tenth in terms of its contribution to the overall value premium for agricultural products and foodstuffs. The sector registered a 1.47 value premium rate.

The majority of the products within the agri-food sector had a value premium rate ranging between 1 and 3.

Figure 49 - Value premium rate of GI products per category and Member State⁵⁰



Source: AND International study for DG Agri

Table 67 - Share of the GIs' sales value in the main sectors/Member States

MS	Share in the EU sales value under GIs for the agricultural products and foodstuffs scheme
Italy - Cheeses	14 %
Germany - Beers	10 %
Italy - Meat products	8 %
France - Cheeses	7 %
United Kingdom - Fresh meat	6 %
Netherlands - Cheeses	6 %
Germany - Meat products	4 %
Spain - Meat products	4 %
United Kingdom - Fresh fish	3 %
France - Fresh meat	3 %
Czechia - Beers	2 %
Spain - Fruits, vegetables, cereals, etc.	2 %

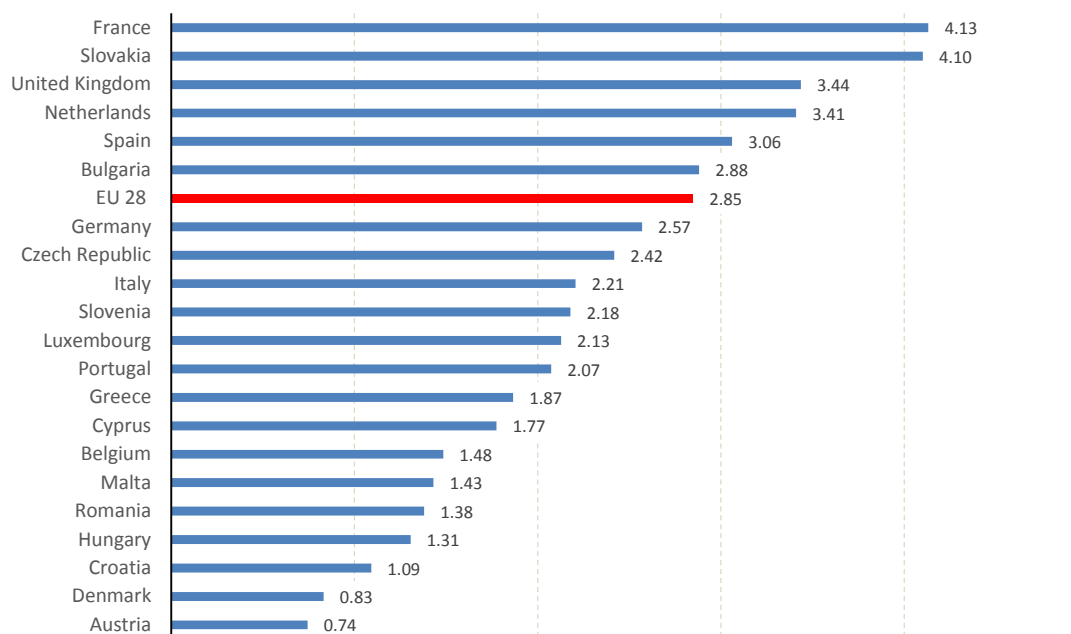
Source: AND International study for DG Agri

⁵⁰ Value premium rates are shown for those products with the largest contribution to the value premium of the EU28 agricultural products and foodstuffs.

J.3 Value premium by Member State in the wine sector

The average EU28 premium rate for wines in the GI scheme was 2.85 in 2017. This average is driven up by a few MSs, including France, Spain, Slovakia, the UK and the Netherlands (the last three of these five MSs have very little wine production).

Figure 50 - Value premium rate in the main Member States in the wines scheme



Source: AND International study for DG Agri

The largest GI wine producers have all increased their total sales value between 2010 and 2017. France kept its leading position with 49 % of the sales value of GI wines in the EU, followed by Italy (22 %) and Spain (11 %).

Thus, GIs in France, Italy and Spain represented 82 % of the 2017 EU sales value in the wine scheme. GIs in Germany, Portugal, Austria and Hungary made up another 14 %, and GIs in the other MSs accounted for the remaining 4 %.

Table 68- Share of GI' sales value in the wine scheme

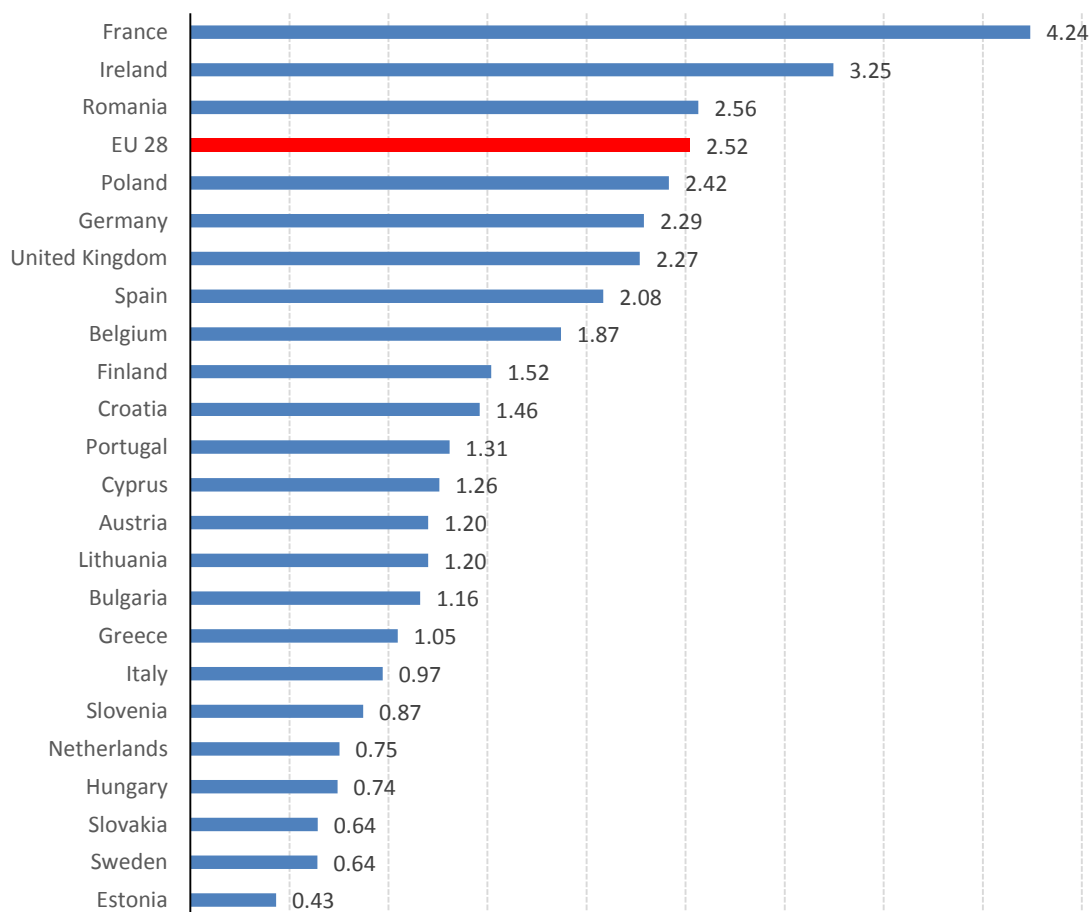
	2010		2017	
	%	Million EUR	%	Million EUR
France	52.1 %	15.45	49.2 %	19.38
Italy	19.2 %	5.69	21.8 %	8.60
Spain	11.8 %	3.50	11.3 %	4.46
Germany	7.1 %	2.12	8.2 %	3.22
Portugal	3.9 %	1.16	4.3 %	1.68
Austria	2.1 %	0.61	1.7 %	0.67
Others	3.7 %	1.10	3.6 %	1.42

Source: AND International study for DG Agri

J.4 Value premium by Member State in the spirit drinks sector

Within the spirit drinks scheme, GIs in the UK, France and Ireland accounted for 90 % of the sales value, with the UK and France representing 80 %. Poland, Sweden and Italy gathered another 6 % of the total sales value in the sector, whereas the other MSs accounted for the remaining 4 %.

Figure 51- Value premium rate per Member State in the spirit scheme



Source: AND International study for DG Agri

France reported the highest value premium rate (4.24), followed by Ireland (3.25), whereas the UK had a premium rate close to the EU average (2.27 versus 2.50).

In the second group, Poland was the leading MS with a value premium of 2.42, and Italy and Sweden ranked second and third with 0.97 and 0.64, respectively.

Among the MSs reporting a smaller contribution to EU spirit drinks sales value, those with a notable value premium were Romania (2.56), Germany (2.29), Spain (2.08) and Belgium (1.87).

Table 69 - Share of GI' value in the spirit drinks scheme, 2017 (%)

	Share in the spirit drinks total sales value
United Kingdom	43%
France	43%
Ireland	11%
Poland	3%
Germany	1.3%
Spain	1.1%
Others*	-2%

(*) 17 Member States with a GI spirit production, out of which 6 with a negative contribution to the EU28 value premium for the GI spirit drinks.

Source: AND International study for DG Agri

J.5 Value premium rates by combinations of MS/product

Table 70 shows the GI sales value, the value premium and the value premium rate of the 15 combinations that contributed the most to the EU value premium in the sectors under GIs, and which accounted for 92 % of the total sales value of EU GI products. They are ranked according to the value premium.

Wine is the most important provider of value premium

The French wine sector was still the main contributor to the premium, with a 37 % share and a high value premium rate (4.1).

Wine sectors in Italy and Spain ranked second and third with, respectively, shares of 12 % and 8 % and rates of 2.2 and 3.1.

Wine sectors in Germany and Portugal ranked 6th and 9th with, respectively, shares of 5 % and 2 % and rates of 2.6 and 2.1.

Spirit drinks in the UK, in France and Ireland.

Due to the importance of whiskies and Cognac, the UK ranked 4th, France was 5th and Ireland was 11th. Their value premium rates were 2.3, 4.2 and 3.2, respectively. The share of these three combinations in the value premium is 16 %.

There are some similarities between this sector and the wine sector.

- Three MSs structurally dominate the GI spirit drinks landscape, far ahead of the other production basins.
- The French rate was higher than those of the other MSs. This is largely due to the great importance of the GI sector. Structurally, the non-GI producing sectors are of low importance in volume and are confined to low-end markets. On the producers' side, there is willingness of French producers to obtain high prices for their products.

Cheeses, processed meat, beers and fresh meat.

It is more interesting to compare precise agri-food sectors than to consider the global figures. From this perspective, one can see that cheeses, fresh and processed meats, and beers have reached remarkable positions.

Cheeses in Italy, France and the Netherlands ranked 7th, 8th and 14th, respectively, with mean value premium rates of 1.67, 1.91 and 1.42. Differences between the production structures in these three countries must be emphasised. Italian cheeses constitute a classic example of organisation of GI production and marketing chains; the French situation is characterised by a very large diversity in terms of basins,

receipts and effectiveness of local production and marketing chains; while the successful appearance of the Netherlands in the GI census is a good example of the interest in the European scheme as a promotion and marketing tool.

The Dutch cheese case bears some similarity to the German beer situation. The EU protection tool was first used to achieve stronger protection of the designations; the changes that have occurred in the beer market generated new interest in local production and, together with the local promotion and identification tools, helped improve the resilience of beer production, especially in Bayern. The GI German beer sector was ranked 10th, with a 2 % contribution to the total value premium and an estimated value premium rate of 1.47.

Out of the meat sectors, 3 combinations reached the top 15 for the GI value premium. Classically, Italian cured and cooked meats ranked 11th, with a value premium rate of 1.62. This product range has not experienced much growth during the last seven years (barely 1 % a year); the processed meat sector is under pressure due to high production compared to a decreasing demand, and consequently prices cannot reach their maximum level. On the contrary, in Germany, the number of new GIs and the success of the old GIs led to a strong growth in the sales value. The value premium rate is higher in Germany than in Italy even if the prices of the German GI processed meat products are lower than those in Italy. The reason is that meat product prices are lower in the German market than in Italy; thus, the difference between GI and non-GI (which we call premium) is more important in Germany.

The French GI fresh meat sector ranked 15th. Retailers want GIs and other certifications (Label Rouge, Certificat de conformité produit, regional promotional brands, Bleu Blanc Coeur) to reassure consumers. This trend, together with some difficulties in the French marketing chains, even in the domestic markets, explains the growth of this sector (contrasting with the decline of meat production in France) in all animal species and meat categories: poultry (with a rich 50-year history), beef and veal, pork, and lamb.

Table 70 – TOP 15 combinations for MS/type of product (sales value, value premium, value premium rate)

Countries	Products	GI sales value (billion EUR)	GI value premium (billion EUR)	Value premium rate
France	Wines	19.38	14.69	4.13
Italy	Wines	8.60	4.70	2.21
Spain	Wines	4.46	3.00	3.06
United Kingdom	Spirit drinks	4.75	2.65	2.27
France	Spirit drinks	3.47	2.65	4.24
Germany	Wines	3.22	1.96	2.57
Italy	Cheeses	3.94	1.58	1.67
France	Cheeses	1.92	0.92	1.91
Portugal	Wines	1.68	0.87	2.07
Germany	Beers	2.64	0.85	1.47
Italy	Meat products	2.06	0.78	1.62
Ireland	Spirit drinks	0.98	0.68	3.25
Germany	Meat products	1.17	0.57	1.93
Netherlands	Cheeses	1.56	0.46	1.42
France	Fresh meat	0.74	0.32	1.75

Note: top 15 selection based on GI value premium in 2017

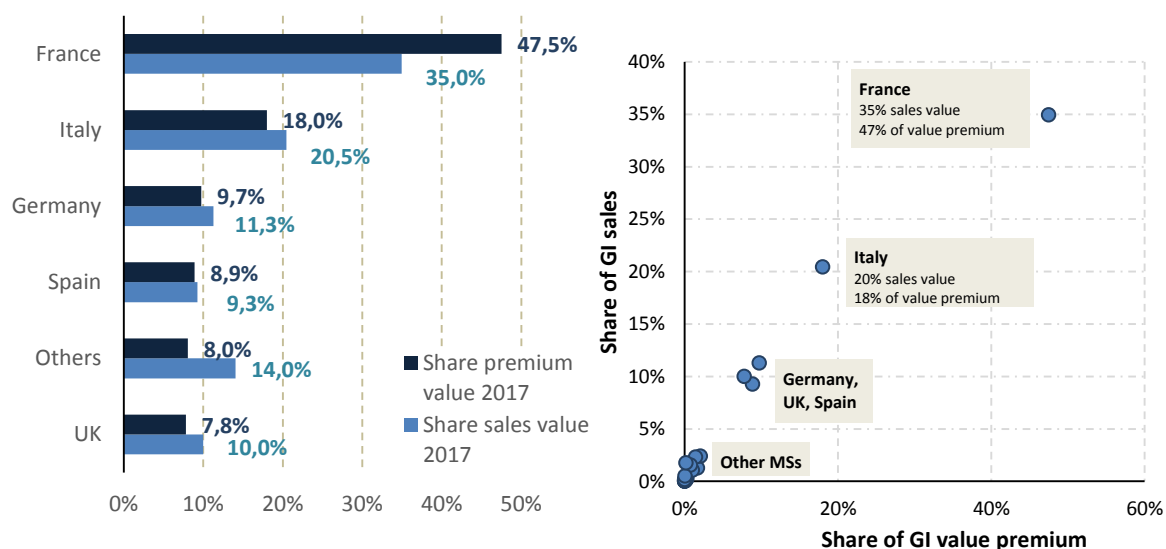
Source: AND International study for DG Agri

J.6 Value premium rates by Member State

Across MSs, most value premium rates were within the 1.00 and 2.00 band in 2017. The main differentiation factor is sales volume. France and Italy are the two leaders in GI production. Together, they produce and sell 55 % of the EU GI products (in value). They also fetch the highest share of economic value from GIs. They capture 48 % and 18 % of the EU GI value premium, respectively. GI sales from Germany, the UK and Spain represent 30 % of EU GI sales, and their associated share of value premium is 27 % of the total EU value premium.

France has an overall value premium rate of 3.38 for its GI production, and Italy has a rate of 1.84. At the other end of the spectrum, Czechia, Sweden and Estonia have the lowest value premium with rates: 0.93, 0.92 and 0.43, respectively. Rates in Sweden and Czechia increased between 2010 and 2017, while the Estonian rate dropped from 1.29 to 0.43. Spain, the UK and Germany registered value premium rates of 1.99, 1.68 and 1.81, respectively, for their GI production in 2017. The Italian, British and Spanish value premium rates all contracted since 2010. The French value premium rate, on the other hand, gained 0.31 points since 2010.

Figure 52 - Share of the total value premium and sales in the main Member States



Source: AND International study for DG AGRI

Twenty-two MSs represented 14 % of the GI sales value with only 8 % of the value premium. Portugal, Ireland and the Netherlands totalled most of the value premium in this group in 2017.

CHAPTER 4: ASSESSMENT OF THE OPTIONS FOR FUTURE UPDATES AND IMPROVEMENTS

K. ASSESSMENT OF DATA COLLECTION

A 10 months study provided estimates of the sales value of 3 207 GIs in 28 MS thanks to a combination of methods:

- collection of public statistics, which is important in some of the GI sector, notably wine;
- qualitative interviews among national authorities and professional organisations;
- direct survey among producers and producers' groups,
- estimates of the missing data.

Accuracy of the global data was due to the high concentration of the sales value in a limited number of sectors and MS (notably France, Italy, Germany and UK).

However, some grey area remain in some MS and schemes, such as:

- when the statistical system does not focus on GI;
- when there is no professional organisation for GI supply chains.

We estimate that these gaps do not have a large impact on the total data but hamper monitoring of the GI schemes.

L. PROPOSALS

L.1 Structuring the data collection system in every Member State

Between the two studies carried out in 2012 and 2019, no improvement has been noticed regarding the availability of centralised and detailed data at Member State level. France, Italy, Spain and Portugal perform centralised GI/TSG data collection, but Spain remains the only MS that provides full and detailed data by individual GI/TSG on an annual basis.

The implementation of data collection systems for GI/TSG schemes (for each GI/TSG or for a group of GIs/TSGs) in each MS would make updates more achievable and would improve the accuracy of the data.

This could be implemented at local, regional and national levels. The data collection could cover, on an annual basis:

- sales volume and/or sales value,
- prices (ex-factory / ex-winery / ex-distillery stage),
- intra-EU trade and exports to non-EU countries.

Such task could be performed by public authorities or collective organisations such as: producers' groups or, interbranch organisations.

Data could be gathered once a year or once every two years at national level.

The two limits identified at this stage are:

- The absence of legal obligation for MSs to collect GI/TSG economic data. As long as this kind of survey is not mandatory for MSs (possibly according to a threshold number of GIs), national authorities would be unlikely to launch such investigations. The DG AGRI would have to define the data to be collected.
- The cost of structuration data collection system and database by MS. For instance, in Spain, around 1.6 FTE manage the collection of data, their control

and the publication for a total of 342 GIs and a total sales value of EUR 6.2 billion in 2017. To support this action, several options could be implemented by MSs willing to structure such a centralised data collection system.

- It should be assessed to what extent the European Agricultural Fund for Rural Development could support the structuration of the data collection system in MSs.
- Fees could be charged to operators: the EU legal framework for quality schemes⁽⁵¹⁾ allow MSs to charge fees to cover the costs of the management of agricultural products and foodstuffs and wines.
- Other national resources could be used.

L.2 Developing regular updates of the GI/TSG database based on semi-aggregated data

The monitoring of GI/TSG sales could be implemented more frequently with the objective of estimating the global trend of GI/TSG sales without updating data for each individual GI/TSG. With this method, detailed data as provided in this study could not be established and estimates would gather groups of GIs/TSGs.

To develop a regular update of the GI/TSG database at EU level, this data collection method would aggregate the following data sources:

1. Centralised data available yearly in some MSs and sectors (agricultural products and foodstuffs in France, Italy, Portugal and Spain; wine in Spain).
2. Data from DG AGRI and national statistics on the wine sector.
3. European trade data for whole exports (mainly used for wine with PDO/PGI codes and some GIs identified in spirit drinks and agricultural products and foodstuffs schemes). Indeed, Comext codes could be extended for some categories of product that are mainly exported (such as vinegar under GI, beer under GI, fresh fish).
4. Data collection with public or semi-public bodies in charge of data collection in France, Italy and Portugal in order to collect individual or semi-aggregated data that are collected annually but not usually published.
5. A direct survey covering the larger GIs/TSGs for which there is no centralised data (such as agricultural products and foodstuffs in Germany and the UK; spirit drinks in France and the UK; cheeses in the Netherlands; beer in Czechia). The objective is to cover all GIs with an annual sales value exceeding EUR 300 million. This threshold defines a sample of 47 GIs/TSGs, accounting for EUR 40 billion, which represents 52 % of the 2017 whole sales value. Among these 47 GIs/TSGs, only 20 would be covered by direct survey or estimates (for the others, centralised data could be collected).

The same reasoning with a EUR 20 million threshold gives the following: 74 GIs/TSGs, with a sales value of EUR 47 billion (61 % of the whole value); need for direct survey/estimates for 31 GIs/TSGs.

6. A direct survey covering each newly registered GI/TSG.

⁵¹ Article 47 of Regulation No 1151/2012 and Article 108 of Regulation (1308/2013).

As there is no regulatory obligation to answer direct surveys, the coverage of this kind of task is based on stakeholders' wishes. That is why specific actions could be implemented to make them sensitive to the benefits of updating such a study; for instance, sending a fact sheet to anyone who answers, or organisation of information meetings at EU28 level. As the targeted groups are those that are the most important in the EU and the newly registered ones, one could reasonably assume that the answer rate would be satisfactory.

The output of such an update would be, at least, an estimate of the total sales value per scheme. A complement could be targeted data collection in secondary MSs; by rotation, each MS would be targeted one year out of three.

This kind of update could be implemented annually for a limited cost. The advantage of an annual update would be to create a regular link with the stakeholders through information exchange.

L.3 Exhaustive update on behalf of the EU Commission

An exhaustive survey of GIs/TSGs registered at EU28 level, as performed in 2009, 2012 and 2019, is a large project.

This could be performed every two or three years if no other regular update is performed. Experience shows that after seven years, parts of the survey material become obsolete (addresses, key contacts, questionnaires); but with higher frequency, the collecting and calculation costs would be lower.

The advantages of an exhaustive update every two years are as follows.

- Available figures are still useful.
- Important changes (for instance, rapid growth of a GI or a group of GIs) would be identified more quickly.
- The cost is not very high compared to the service provided.
- Stakeholders (and, notably, producers' groups) would be better involved in the data gathering process.
- Animation, at European level, would be eased by regular updates.

ANNEXES

Annex 1: Products registered between 01/01/2017 and 31/12/2017

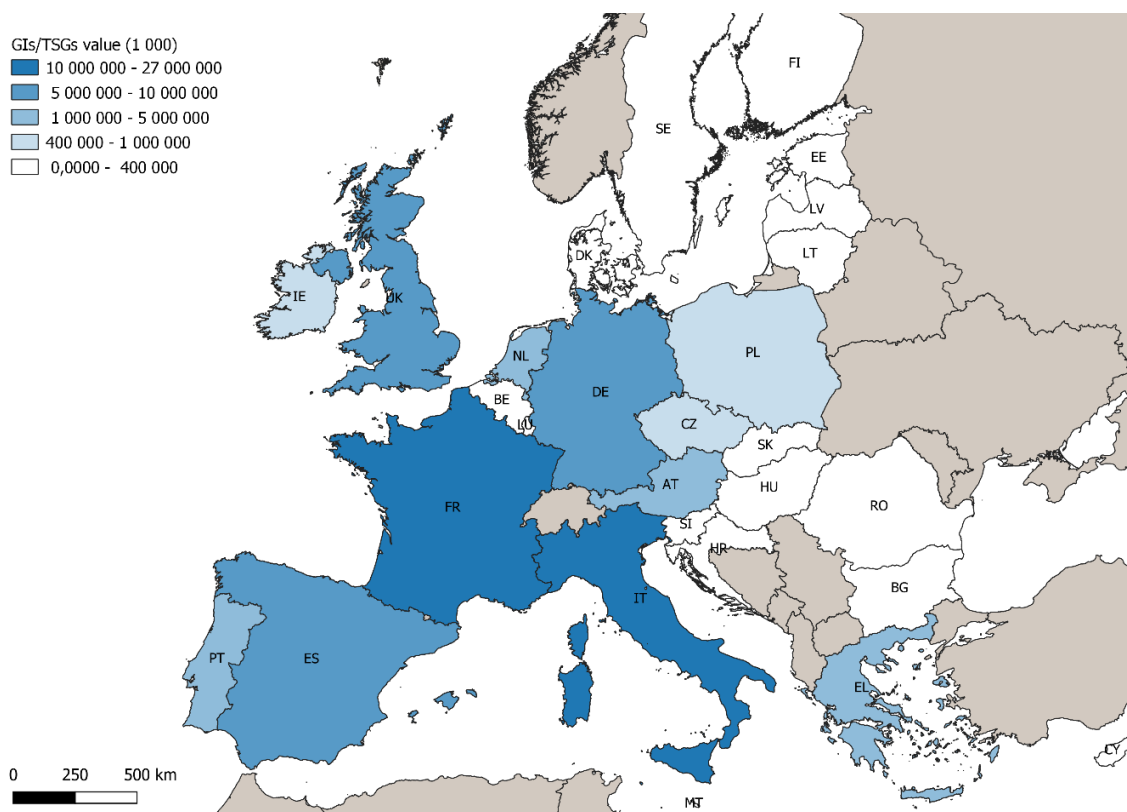
File_Num	Desig_Lab	Prod_Lab	Country	Registr_Date
PDO-BE-02172	Maasvallei Limburg	Wine	BE	21/12/2017
BE/0005/1222	Saucisson d'Ardenne / Collier d'Ardenne / Pipe d'Ardenne	Other cured meats	BE	27/10/2017
BG/0007/1255	Pastarma govezhda	Other cured meats	BG	22/06/2017
PDO-DE-N1822	Bürgstadter Berg	Wine	DE	17/05/2017
DK/0005/0830	Danbo	Hard cow cheese	DK	19/10/2017
EL/0005/2208	Melekouni	Pastry / cakes	EL	19/12/2017
EL/0005/2142	Pefkothymaromelo Kritis	Honey	EL	15/09/2017
ES/0005/1355	Capón de Vilalba	Poultry	ES	10/10/2017
ES/0005/1268	Miel Villuercas-Ibores	Honey	ES	20/01/2017
FR/0005/2103	Ail violet de Cadours	Garlic	FR	13/06/2017
FR/0005/2102	Brillat-Savarin	Soft cow cheese	FR	19/01/2017
FR/0005/2099	Charolais de Bourgogne	Bovines	FR	31/05/2017
FR/0005/2105	Jambon noir de Bigorre	Pork Ham	FR	15/09/2017
FR/0005/2165	Kintoa	Pigs	FR	21/10/2017
PDO-FR-02113	La Clape	Wine	FR	15/12/2017
FR/0005/1375	Lucques du Languedoc	Table olive	FR	15/02/2017
PDO-FR-N1672	Picpoul de Pinet	Wine	FR	21/12/2017
FR/0005/2106	Porc noir de Bigorre	Pigs	FR	15/09/2017
FR/0005/2095	Raclette de Savoie	Hard cow cheese	FR	27/01/2017
PDO-FR-02084	Terrasses du Larzac	Wine	FR	17/05/2017
HR/0005/2180	Međimursko meso 'z tiblice	Preparations from pork (100%)	HR	30/11/2017
HR/0005/1216	Slavonski kulen / Slavonski kulin	Preparations from pork (100%)	HR	07/11/2017
HR/0005/1132	Varaždinsko zelje	Other brassicas	HR	19/10/2017
HU/0005/2155	Makói petrezselyemgyökér	Other leafy or stalked vegetables	HU	05/12/2017
IT/0005/2204	Lenticchia di Altamura	Pulses	IT	19/12/2017
IT/0005/1338	Marche	Olive oil	IT	20/04/2017
IT/0005/2093	Ossolano	Hard cow cheese	IT	04/10/2017
IT/0005/1198	Vitelloni Piemontesi della coscia	Bovines	IT	20/04/2017
PL/0005/2119	Kiełbasa biała parzona wielkopolska	Other cooked meats	PL	07/07/2017
PL/0005/2154	Kiełbasa piaszczańska	Preparations from pork (100%)	PL	21/11/2017
PT/0005/1392	Folar de Valpaços	Pastry / cakes	PT	14/02/2017
PDO-RO-A0030	Murfatlar	Wine	RO	10/05/2017
RO/0005/1183	Novac afumat din Țara Bârsei	Processed Fish	RO	06/04/2017
SI/0005/1191	Štajerski hmelj	Hops	SI	08/08/2017
PDO-SK-01899	Skalický rubín	Wine	SK	15/12/2017
SK/0005/2110	Stupavské zelé	Other vegetables	SK	11/05/2017
UK/0005/1350	London Cure Smoked Salmon	Processed Fish	UK	12/04/2017
UK/0005/1251	Traditional Welsh Cider	Cider	UK	31/05/2017
UK/0005/1250	Traditional Welsh Perry	Cider	UK	31/05/2017
UK/0007/1396	Traditionally Reared Pedigree Welsh Pork	Pigs	UK	10/02/2017
UK/0005/1188	Welsh Laverbread	Other sea products processed	UK	17/05/2017
UK/0005/1179	West Wales Coracle Caught Salmon	Non processed Fish	UK	21/02/2017
UK/0005/1180	West Wales Coracle Caught Sewin	Non processed Fish	UK	28/03/2017

Annex 2: Products for which the area of production covers several MS (15 products) or covers several products families (4 products)

File number	Nb of duplications	Designation Name	Regulation
ES/PGI/0005/0152	3	Cítricos Valencianos / Cítrics Valencians	Agricultural product and foodstuff
FR/PGI/0005/0034	2	Canard à foie gras du Sud-Ouest (Chalosse, Gascogne, Gers, Landes, Périgord, Quercy)	Agricultural product and foodstuff
FR/PGI/0017/0196	2	Pommes et poires de Savoie/Pommes de Savoie/Poires de Savoie	Agricultural product and foodstuff
UK/PDO/0017/0277	2	White Stilton cheese / Blue Stilton cheese	Agricultural product and foodstuff
LT/PDO/0005/00850	2	Seinų / Lazdijų krašto medus / Miód z Sejneńszczyzny/Łódzieszczyzny	Agricultural product and foodstuff
MULTI/PGI/0005/1042	2	Ternera de los Pirineos Catalanes / Vedella dels Pirineus Catalans / Vedell des Pyrénées Catalanes	Agricultural product and foodstuff
MULTI/PGI/0005/1343	2	Rosée des Pyrénées Catalanes	Agricultural product and foodstuff
PGI-BE+FR+NL-01963	3	Genièvre de grains, Graanjenever, Graangenever	Spirit drinks
PGI-BE+NL+FR+DE-01962	4	Genièvre/Jenever/Genever	Spirit drinks
PGI-CY+GR-01828	2	Ouzo/Oúzo	Spirit drinks
PGI-DE+AT+BE-01929	3	Korn/Kornbrand	Spirit drinks
PGI-FR+IT-01909	2	Génépi des Alpes/Genepi degli Alpi	Spirit drinks
PGI-HU+AT-02048	2	Pálinka	Spirit drinks
PGI-IE-01897	2	Irish Whiskey/Uisce Beatha Eireannach/Irish Whisky	Spirit drinks
PGI-IE-02057	2	Irish Cream	Spirit drinks
PGI-IE-02080	2	Irish Poteen/Irish Poitín	Spirit drinks
PGI-NL+BE+DE-01994	3	Genièvre aux fruits/Vruchtenjenever/Jenever met vruchten/Fruchtjenever	Spirit drinks
PGI-NL+BE-01996	2	Oude jenever, oude genever	Spirit drinks
PGI-NL+BE-01997	2	Jonge jenever, jonge genever	Spirit drinks

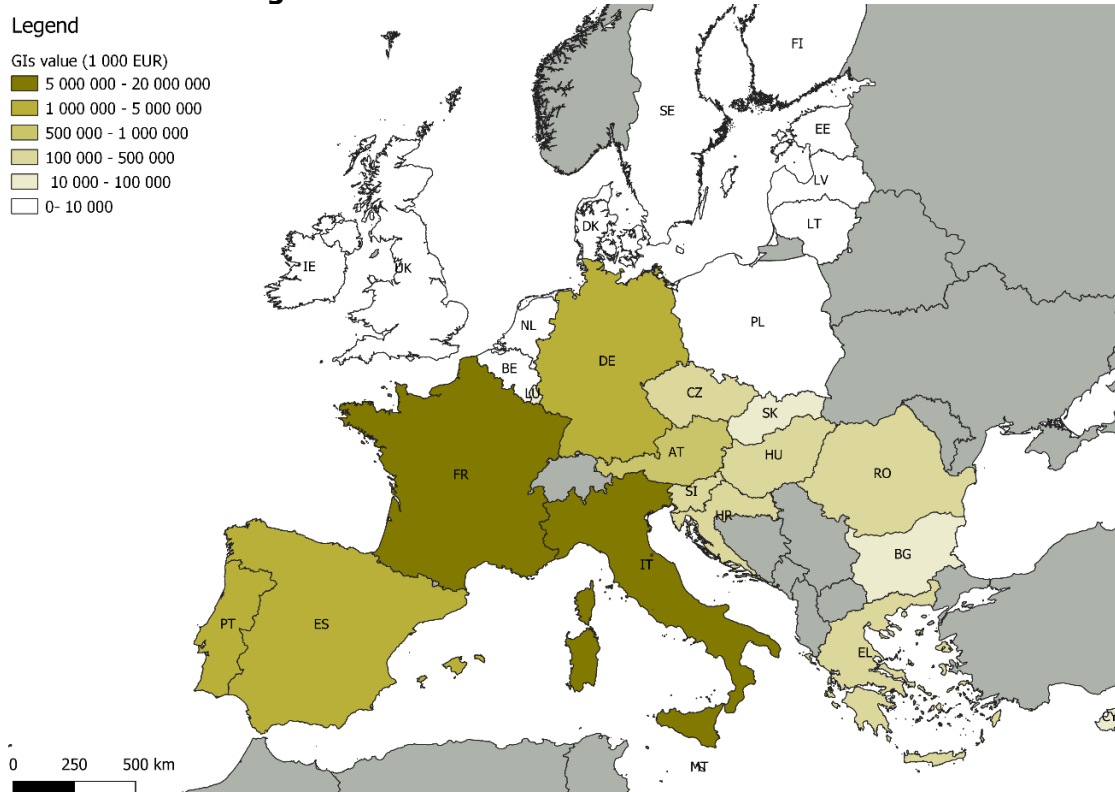
Annex 3: Mapping

Figure 53 – Total value of GIs/TSGs in 2017



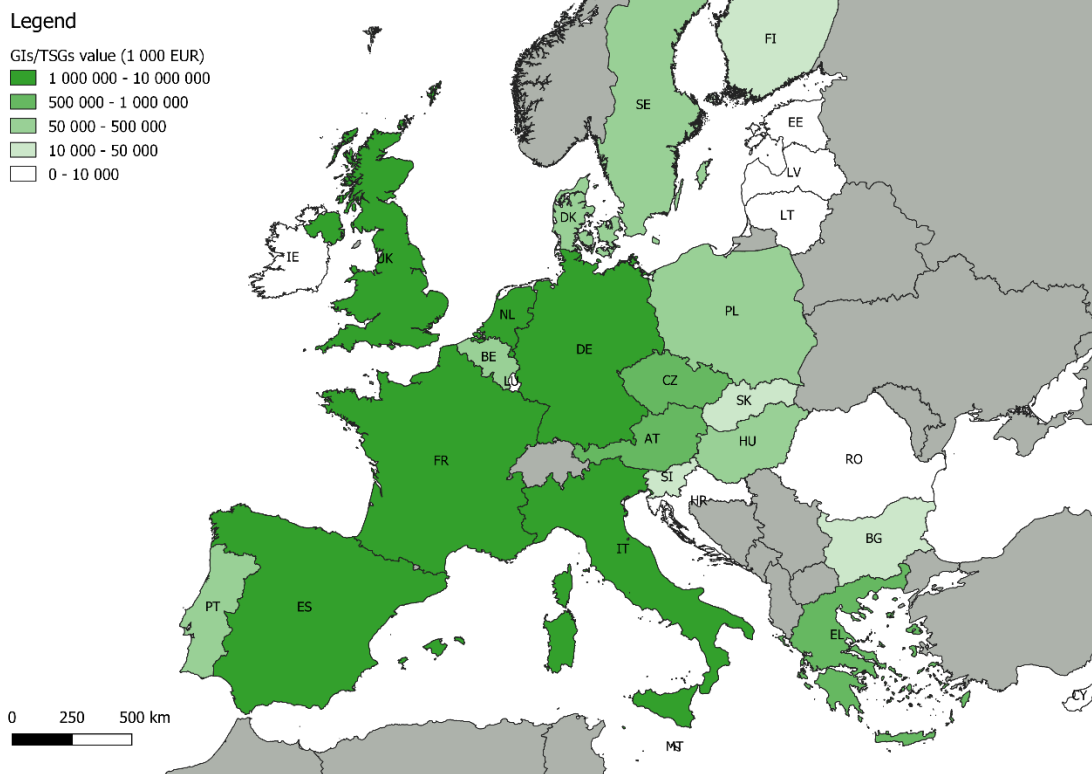
Source : AND International study for DG AGRI

Figure 54 – GI sales value of wines in 2017



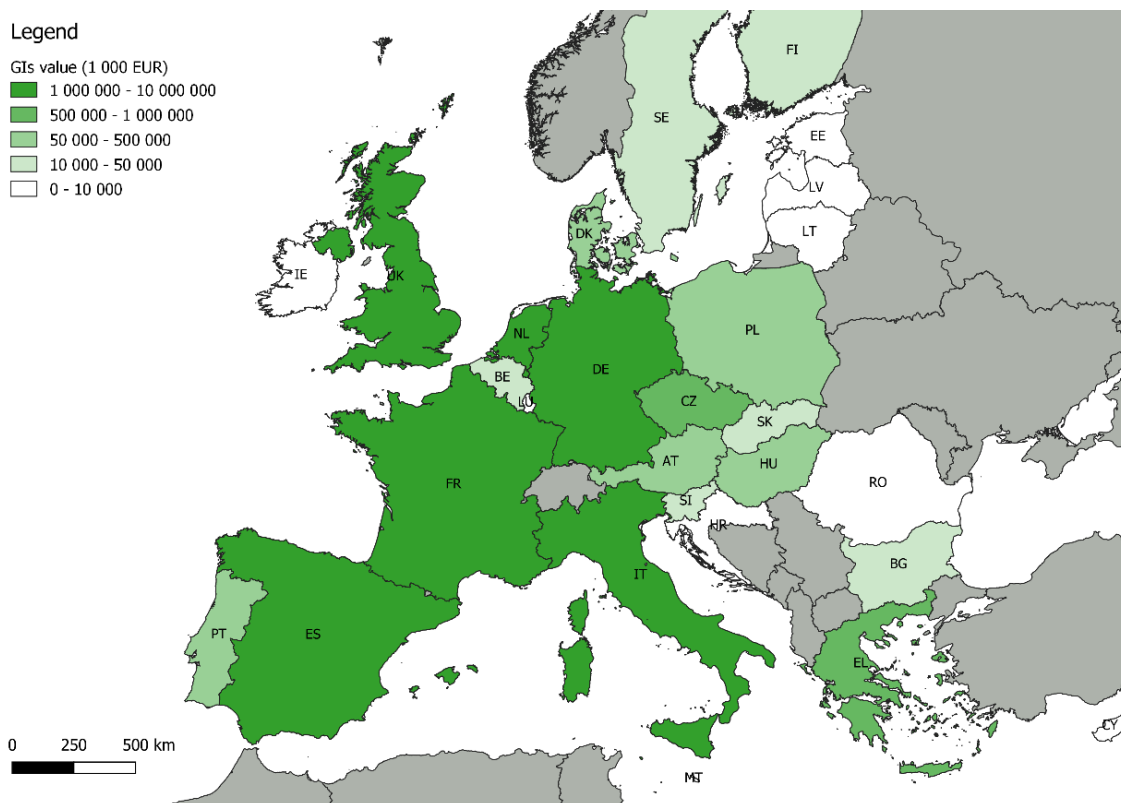
Source: AND International study for DG AGRI

Figure 55 – GI/TSG sales value of agricultural products and foodstuffs in 2017



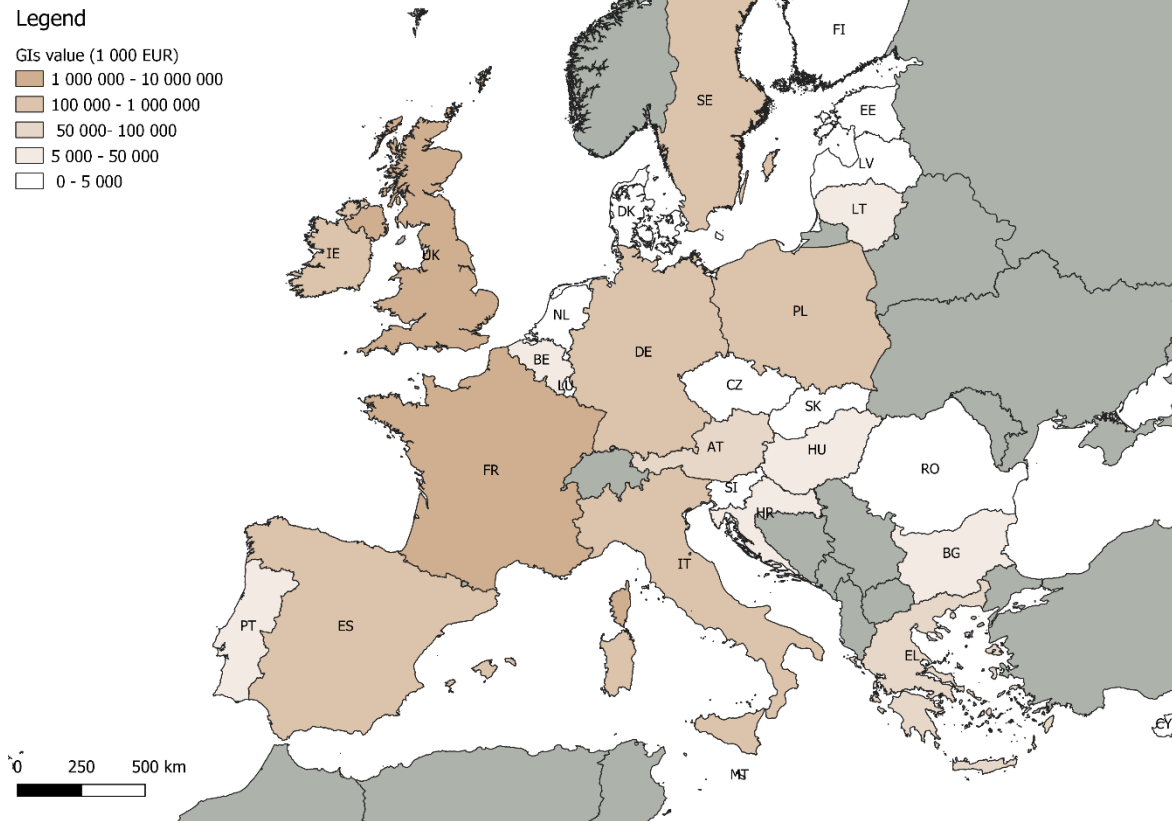
Source: AND International study for DG AGRI

Figure 56 – GI sales value of agricultural products and foodstuffs in 2017



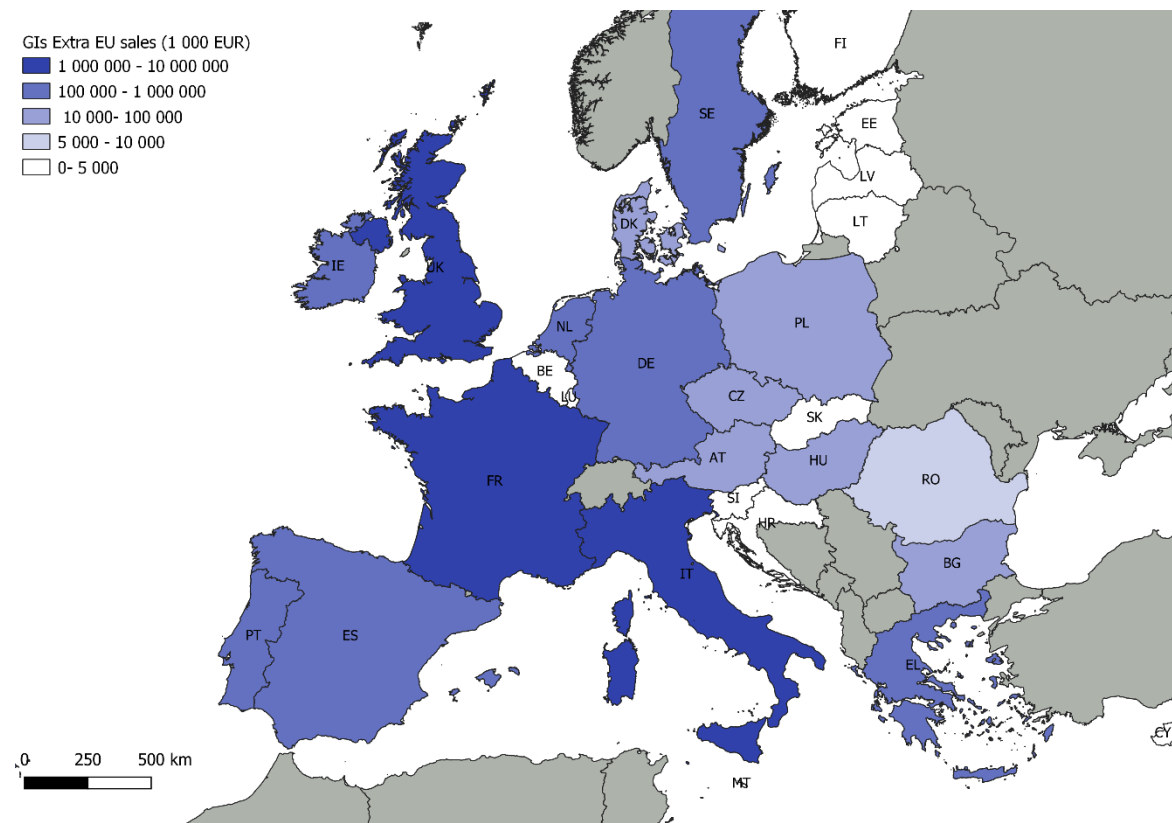
Source: AND International study for DG AGRI

Figure 57 – GI sales value of spirit drinks in 2017



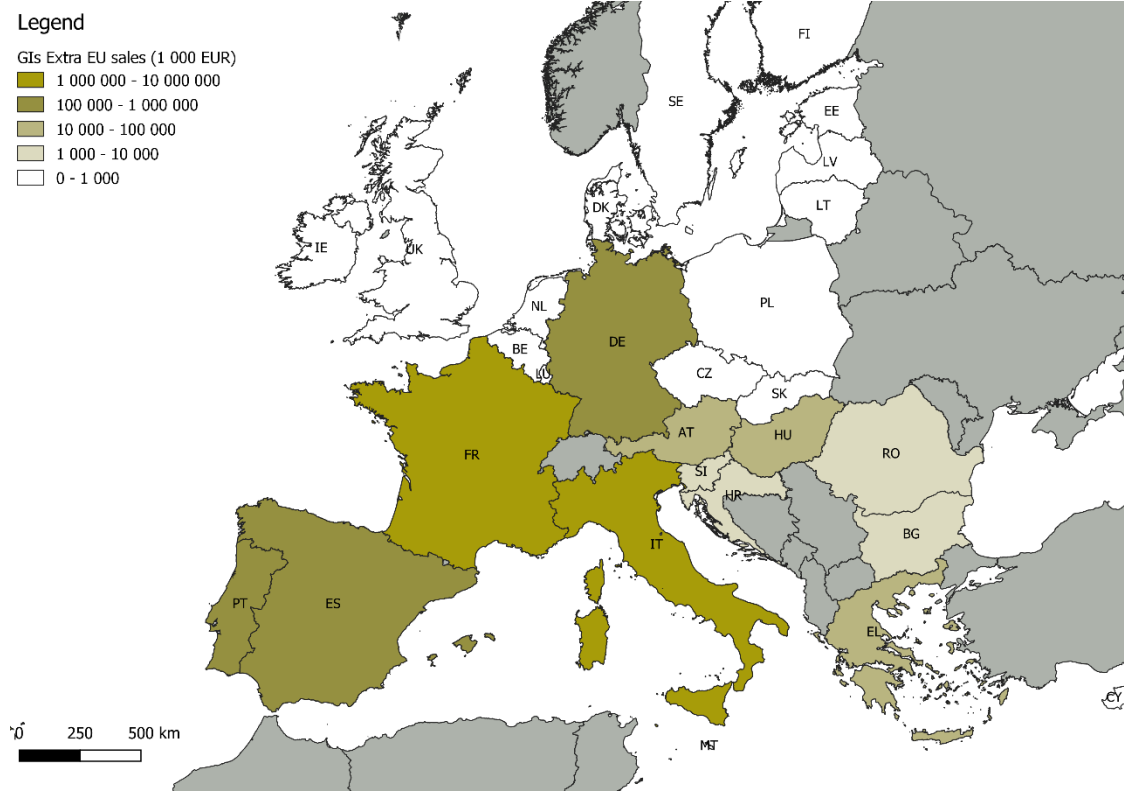
Source: AND International study for DG AGRI

Figure 58 – Value of exports of GIs to non-EU countries in 2017 (all sectors)



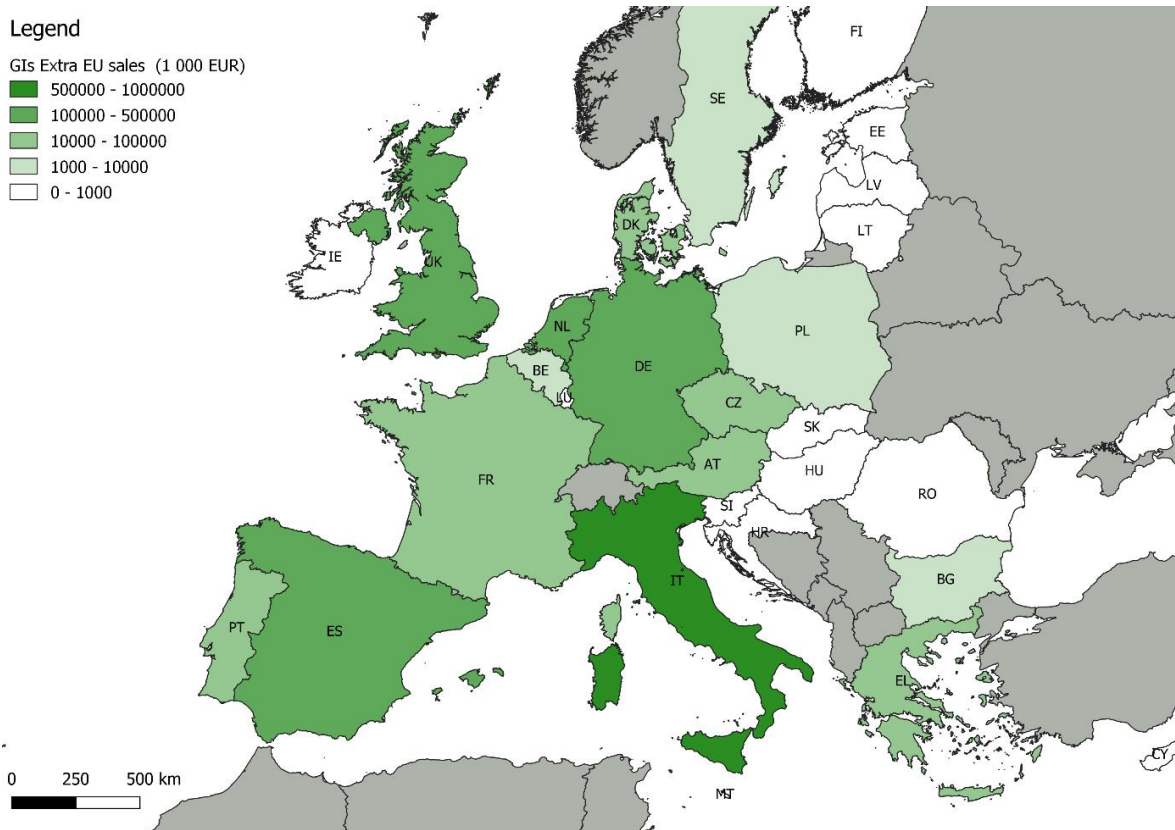
Source : AND International study for DG AGRI

Figure 59 - Value of exports of GI wines to non-EU countries in 2017



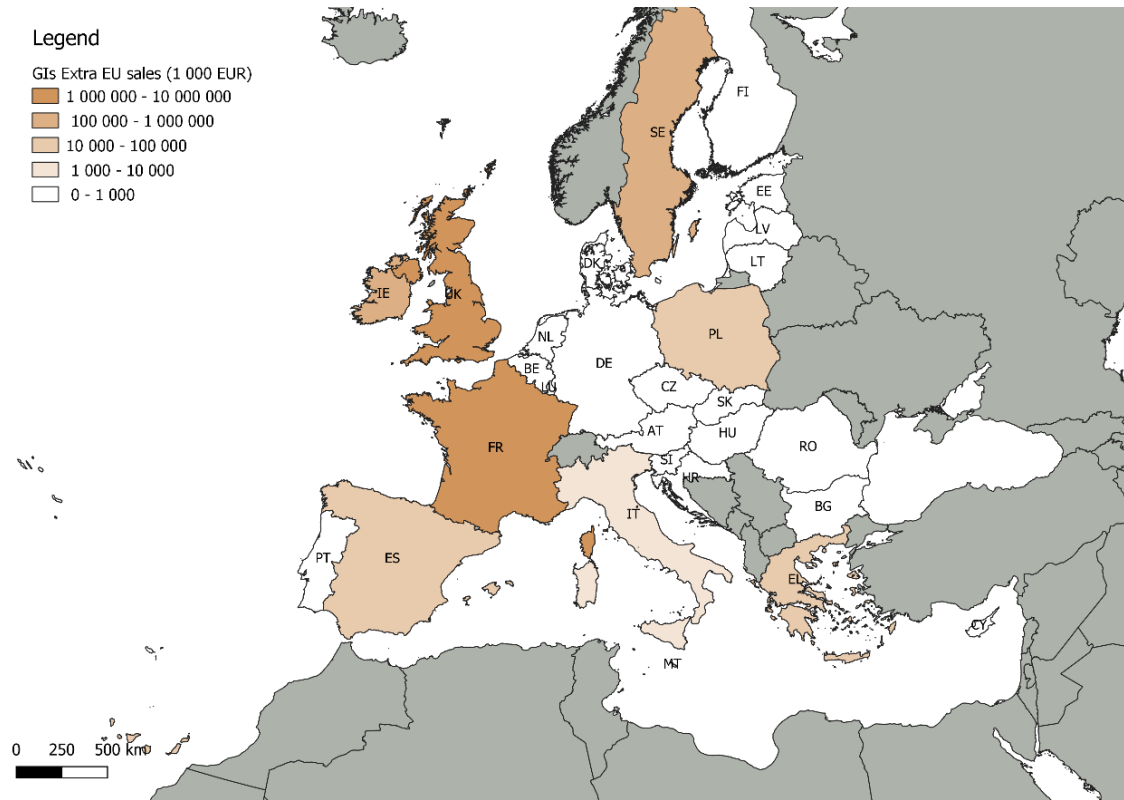
Source: AND International study for DG AGRI

Figure 60 – Value of exports of GI agricultural products and foodstuffs to non-EU countries in 2017



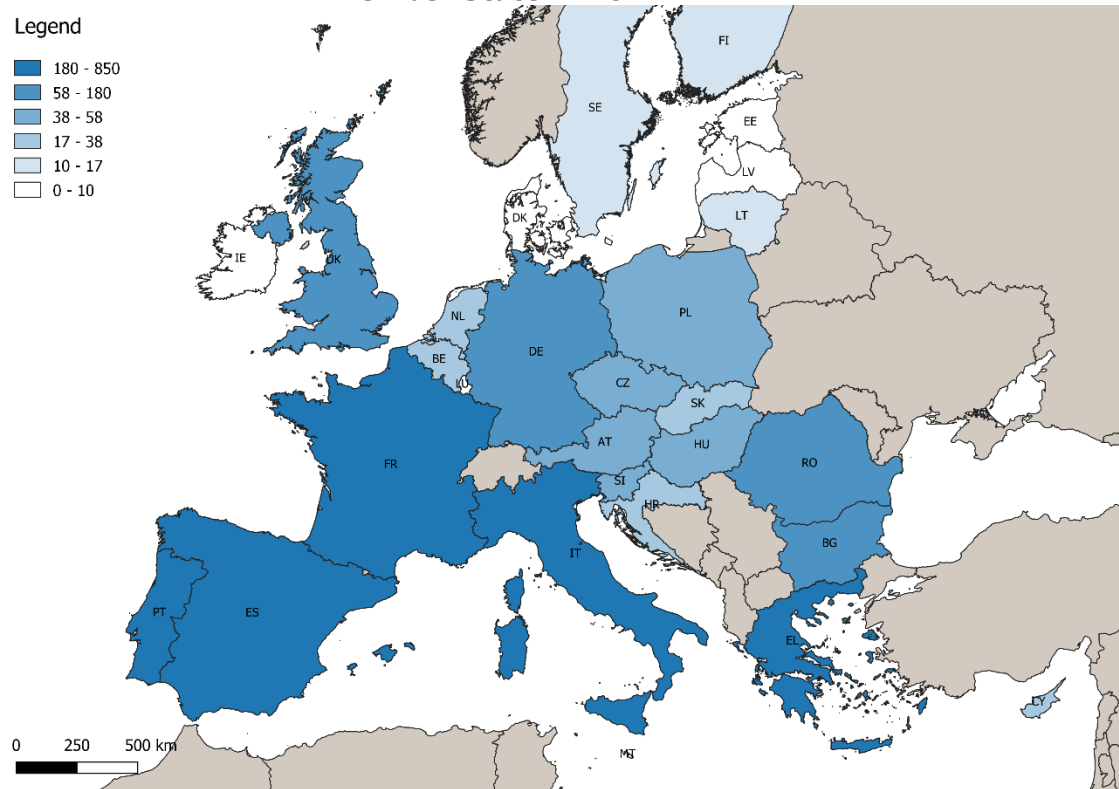
Source: AND International study for DG AGRI

Figure 61 - Value of exports of GI spirit drinks to non-EU countries in 2017



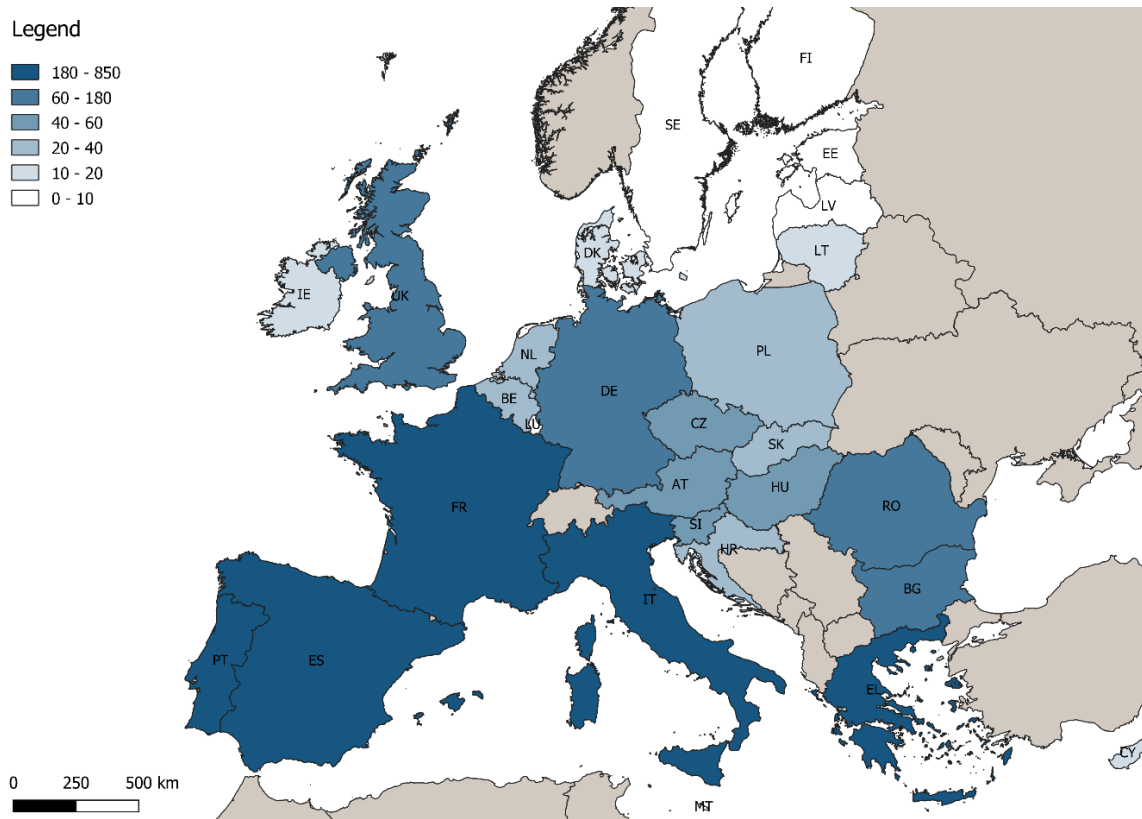
Source: AND International study for DG AGRI

Figure 62 – Mapping of the number of registered GI/TSG products per Member State in 2017



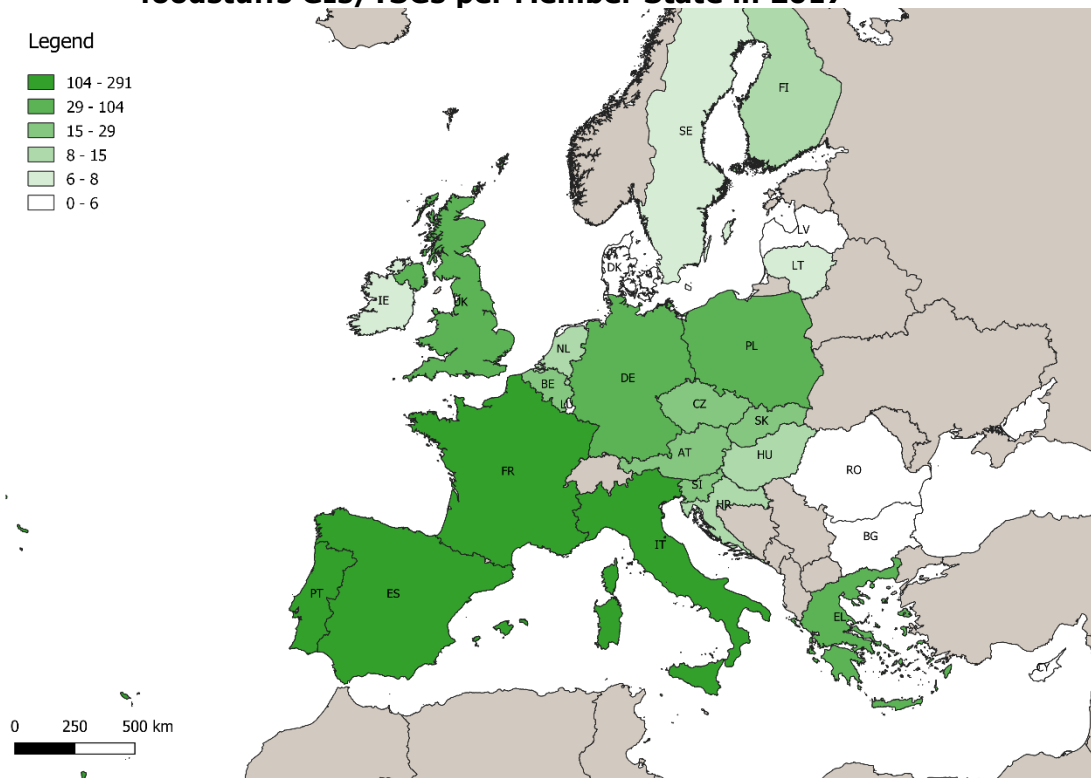
Source: AND International study for DG AGRI

Figure 63 - Mapping of the number of registered GI products per Member State in 2017



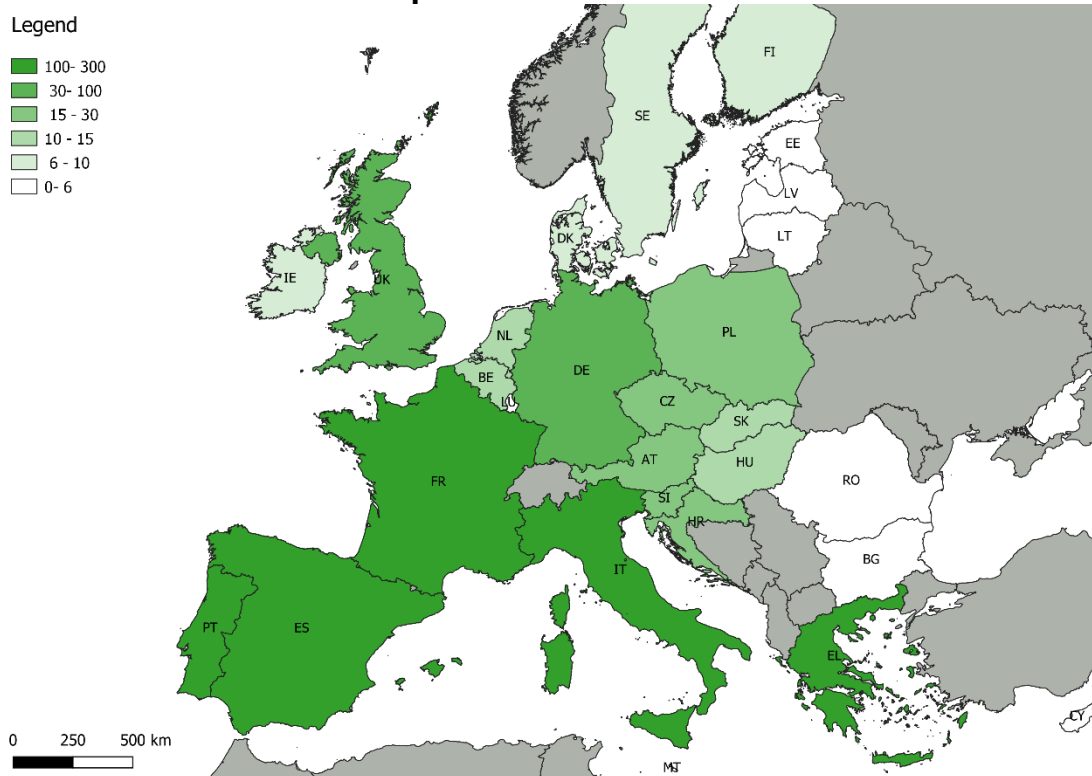
Source: AND International study for DG AGRI

Figure 64 - Mapping of the number of registered agricultural products and foodstuffs GIs/TSGs per Member State in 2017



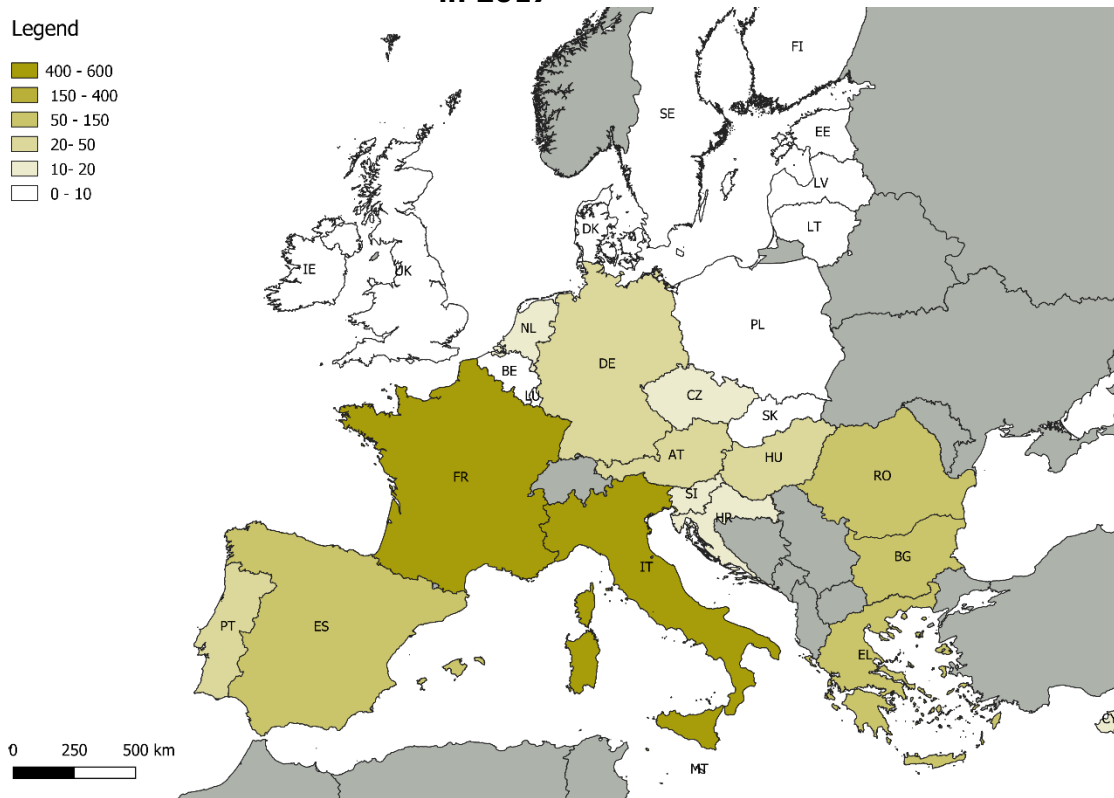
Source: AND International study for DG AGRI

Figure 65 - Mapping of the number of registered agricultural products and foodstuffs GIs per Member State in 2017



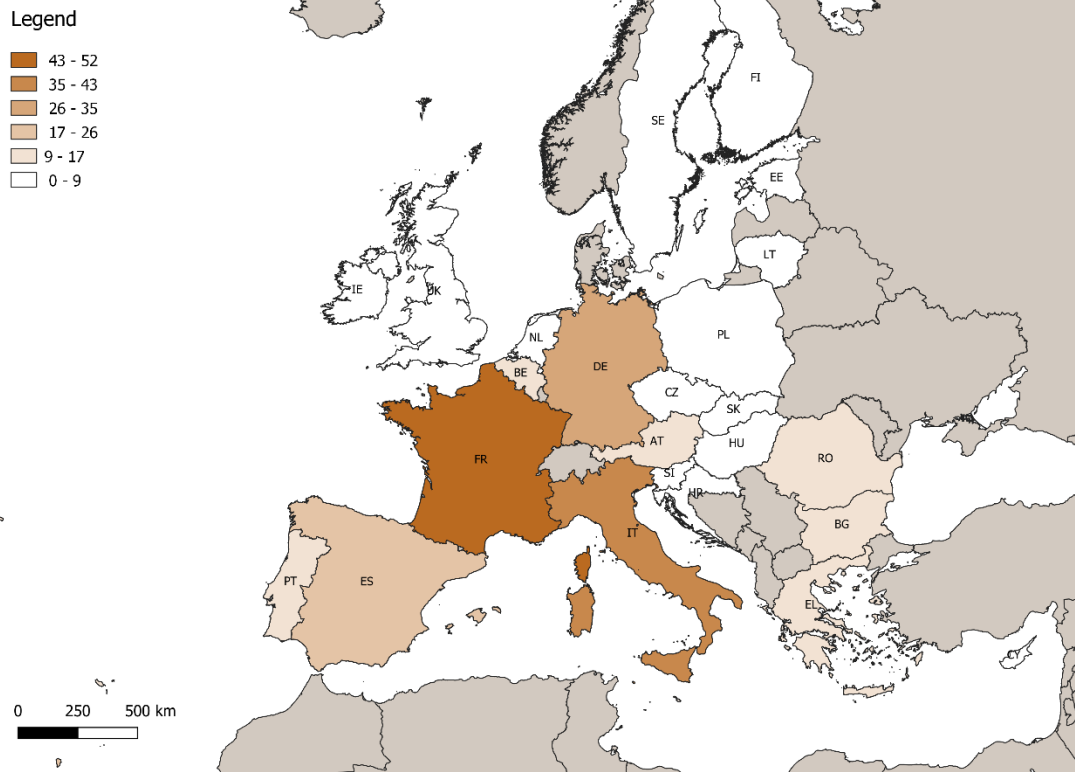
Source: AND International study for DG AGRI

Figure 66 - Mapping of the number of registered GI wines per Member State in 2017



Source: AND International study for DG AGRI

Figure 67 – Mapping of the number of registered GI spirit drinks per Member State in 2017



Source: AND International study for DG AGRI

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