



The value of EU GIs and TSGs

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

CDG meeting of 3 July 2020

AGRI B.3

Sales value of GIs and TSGs

- **Sales value** of EU GIs/TSGs: **€77.1 billion in 2017** (estimated at wholesale stage in the region of production)
- 7% of the total EU food and drink sector (5,7% in 2010)
- Estimate of EU GI/TSGs **exports value** to non-EU countries: € 17.03 billion
- 15.5% of EU food and drink industry exports

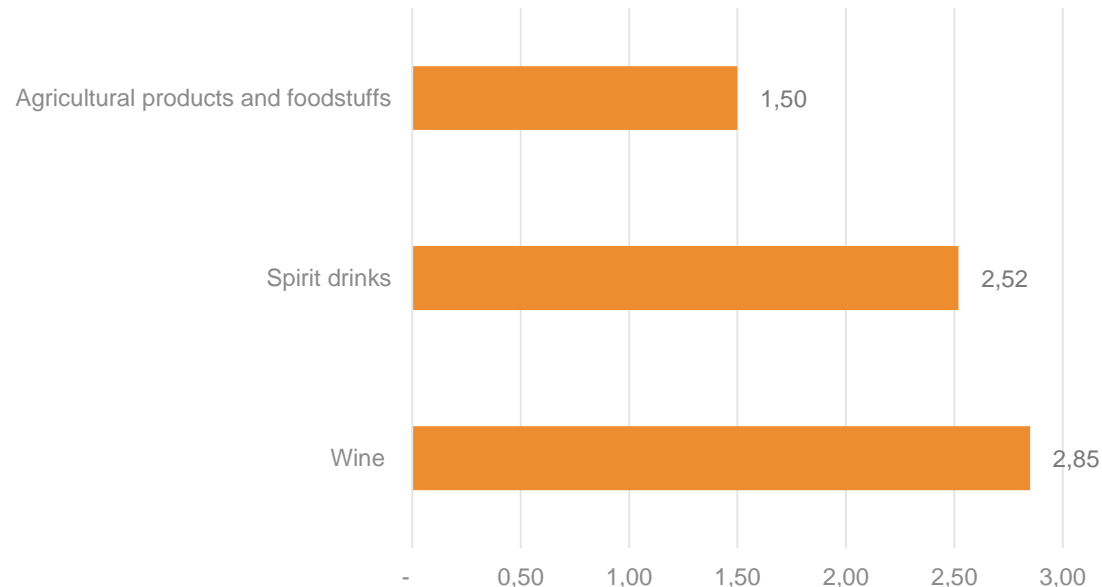
Value premium

The premium a GI can expect from the market, compared to non-GI products

→ on average, the price of a **GI product** is **2.11** times the price of a comparable non-GI product in 2017 (GIs and TSGs 2.07)

/!\ does not reflect value added and profitability of the GI schemes as it does not take into account the additional cost of compliance with GI specifications

Value premium rate in EU 28 by scheme (2017)



The study

- Collection of economic data on all EU 28 GIs and TSGs over the 2011 – 2017 period (3,207 GIs/TSGs)
- 4 sectors covered
 - *agricultural products and foodstuffs (Reg. (EU) No 1151/2012)*
 - *wines (Reg. (EC) No 1308/2013)*
 - *spirits (Reg. (EC) No 110/2008)*
 - *aromatised wines (Reg. (EU) No 251/2014)*
- Outputs: update of the database, report, executive summary

Novelties compared to the previous study

- Inclusion of 54 TSGs
- Accession of Croatia: Croatian product names (38 names)
- Registration of 520 new product names between 2010 – 2017

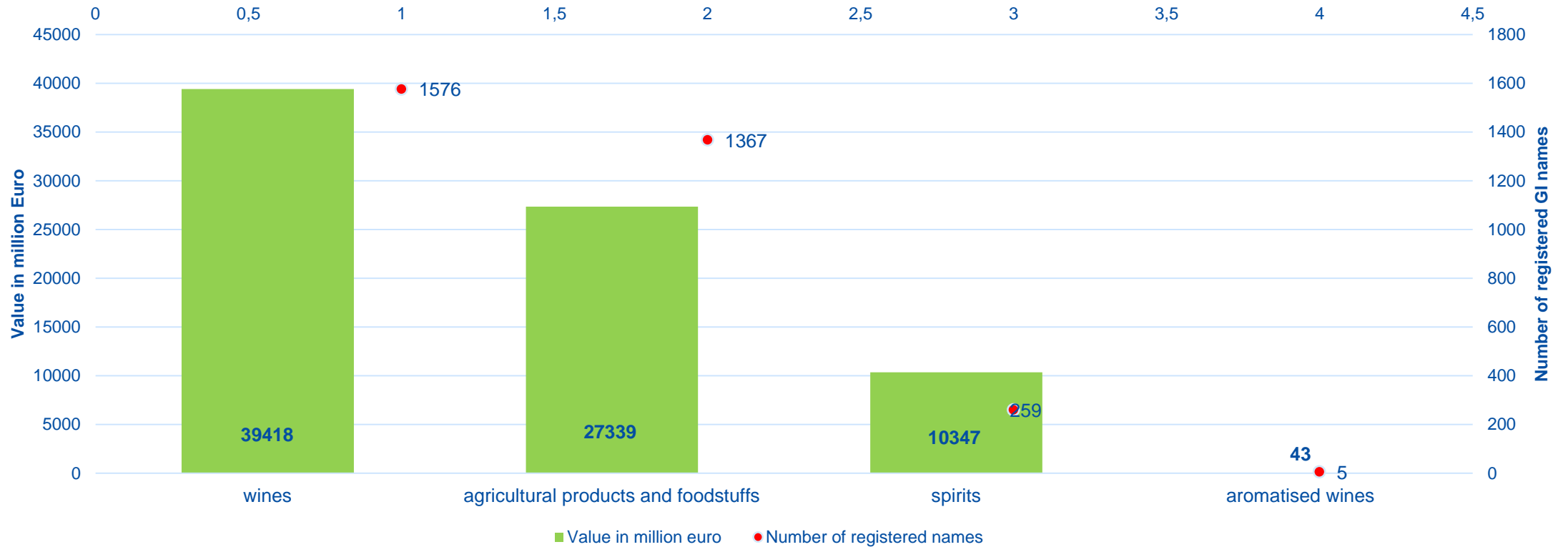
Outputs

- Outputs available on the Commission website:

<https://op.europa.eu/en/publication-detail/-/publication/a7281794-7ebe-11ea-aea8-01aa75ed71a1>



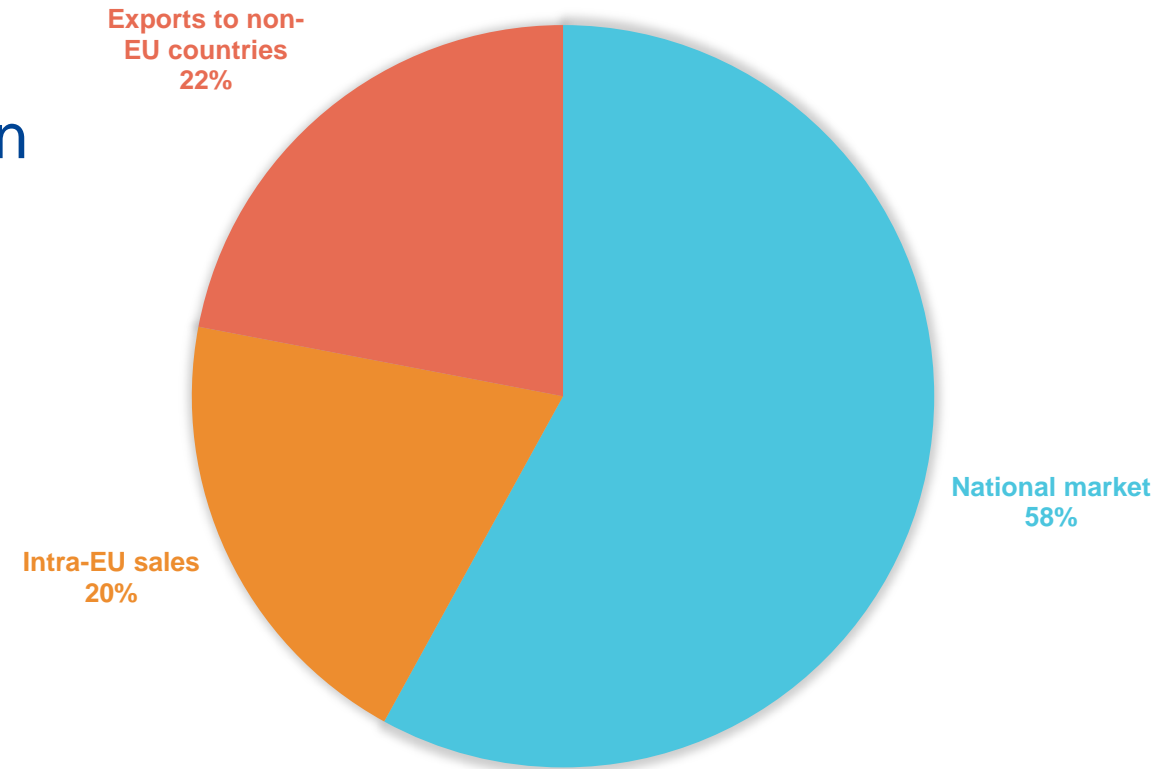
Sales value by scheme (2017)



Sales destinations

- 58% of sales take place on the national market, 20% on the EU market and 22% in third countries
- Wines + spirits = 89 % of total GI exports (in value)
- France, Italy, UK account to 83 % of exports to 3C

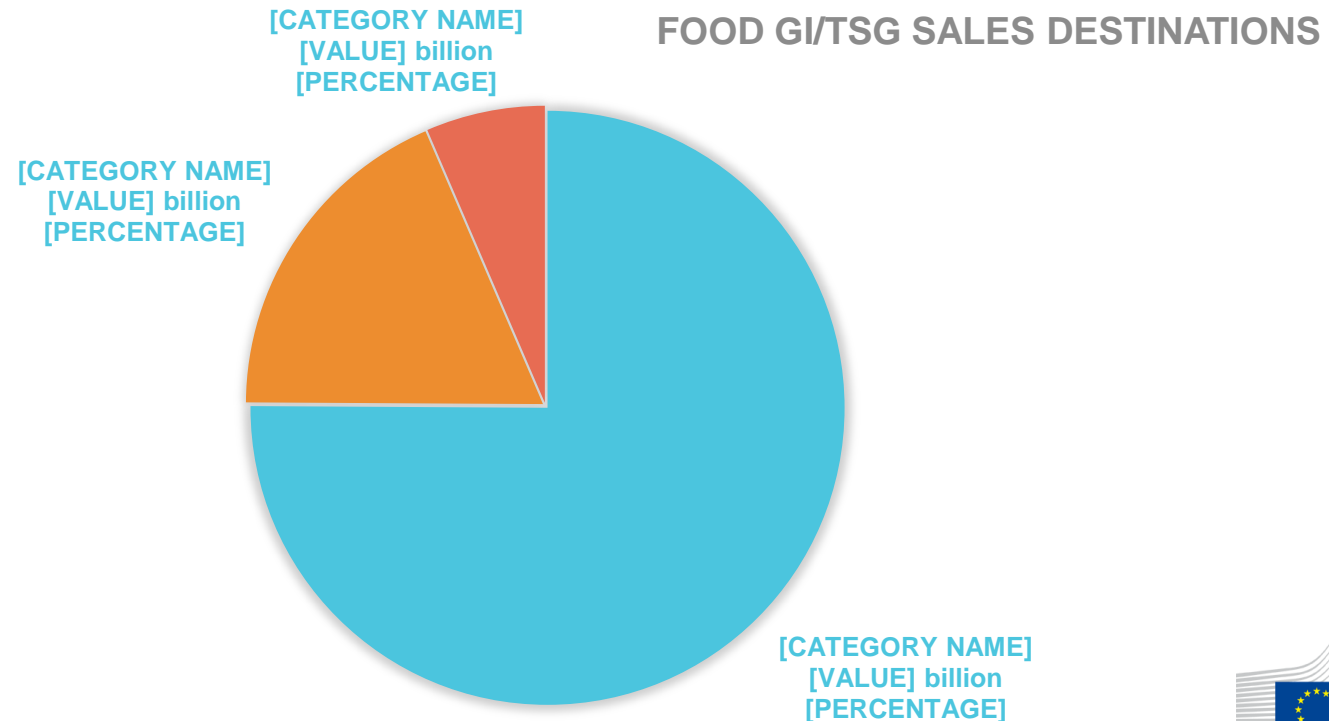
SALES VALUE OF GI/TSG PRODUCTS BY DESTINATION,
2017



Source: AND study for the European Commission

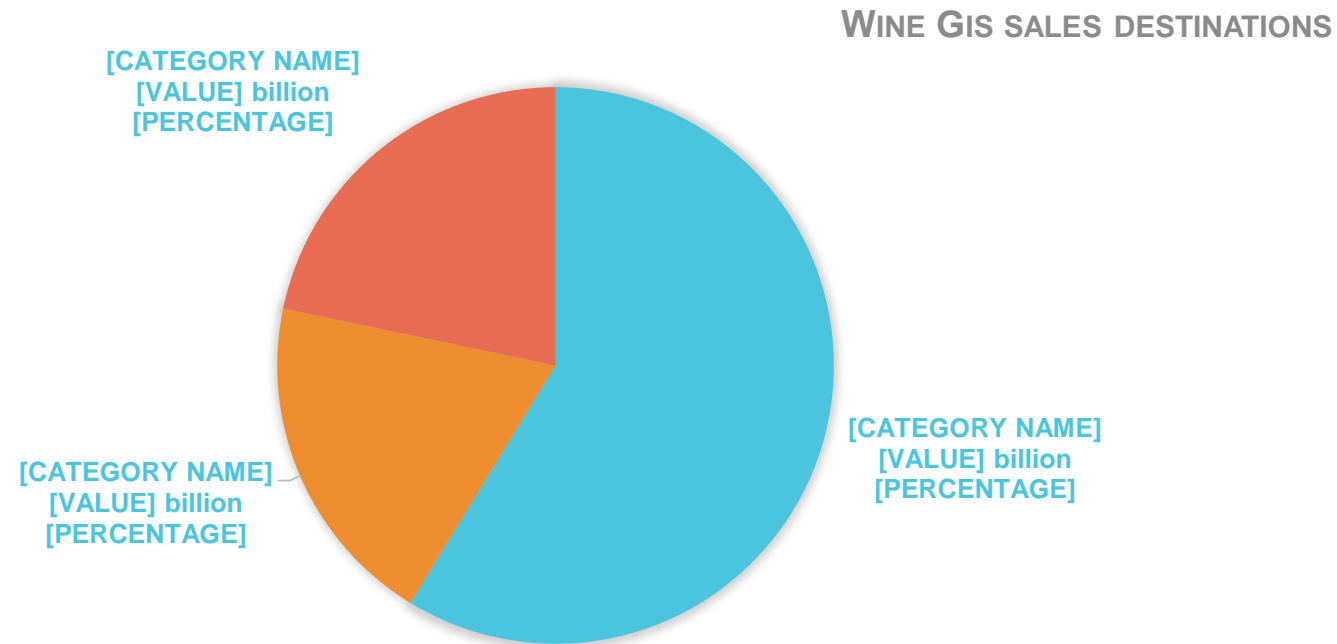
Agricultural products and foodstuffs

- Sales value in 2017: €27.34 billion (of which TSG €2.39 billion)
- Trade: €1.77 billion Extra EU export



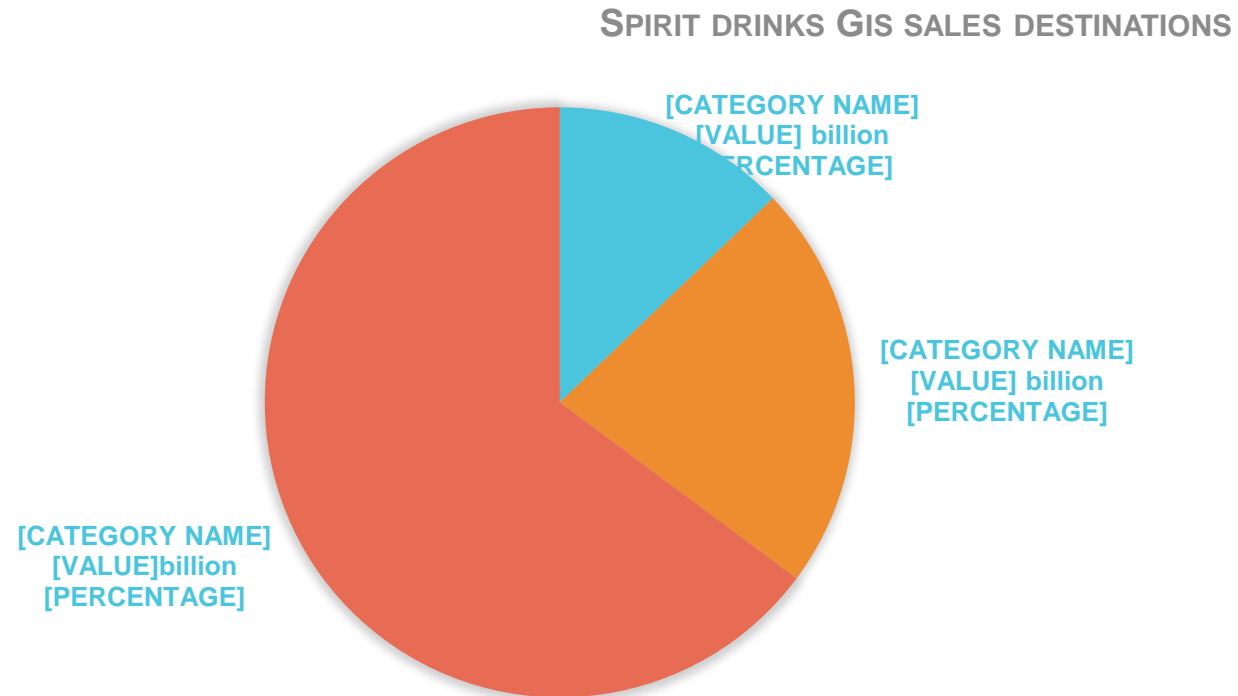
Wines

- Sales value in 2017: €39.4 billion
- Trade: €8.56 billion Extra EU export



Spirit drinks

- Sales value in 2017: €10.34 billion
- Trade: €6.7 billion Extra EU export



Success stories and 'smaller' GIs

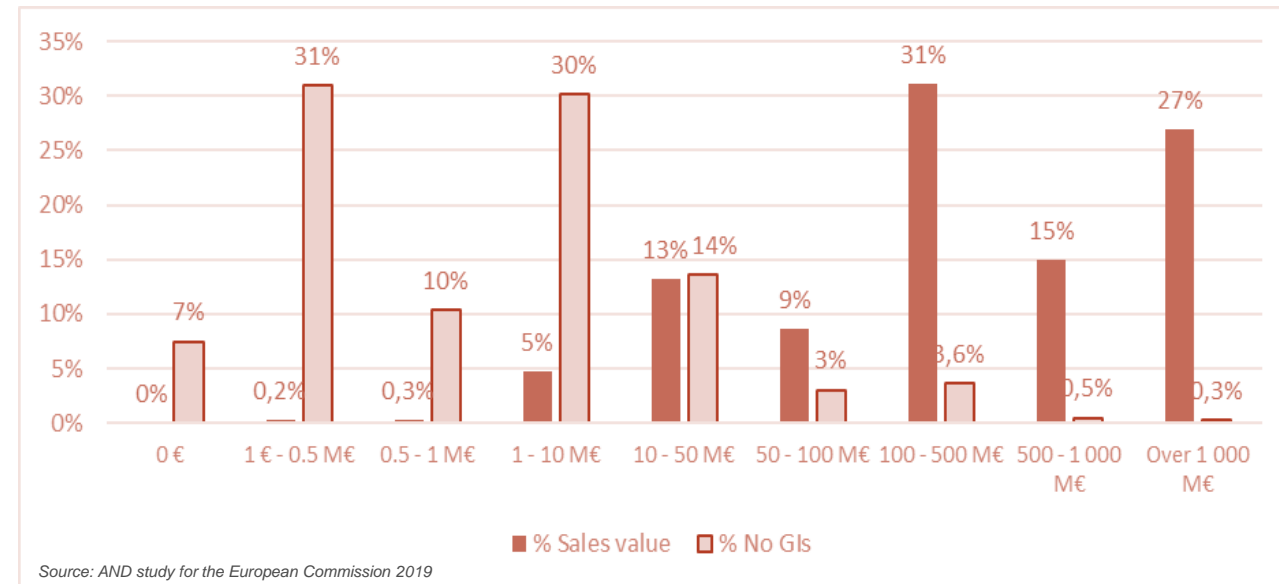
Some impressive success stories:

- 9 GIs > € 1 billion= 27 % of total sales value at EU28 level under GI
- 15 GIs : € 500 million- € 1 billion= 15 % of total sales value at EU28 level under GI
- 113 GIs : € 100 million- € 500 = 31 % of total sales value at EU28 level under GI

Small production may also benefit from the GI schemes:

- Sales volume < € 1 million= 41 % GIs= 0.5 % of the total sales value

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



Thank you



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