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# EU experiences with GIs: market size and concentration

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# Outline of presentation

- Official data on GI output, sales, exports
- Size of GI markets
- Concentration of value

# Official data on GIs

- At EU level:
  - ❖ DOORS database - # GIs registered
    - designation
    - product category
    - description of production process



# AND-International data on EU GIs

- 2010 data for 2,768 GIs in then 27 MSs
  - 1,560 wines (56.4% registered GIs)
  - 337 spirits (12.2% registered GIs)
  - 867 agricultural products and foodstuffs (31.3% registered GIs)

	Number of GIs	% total
Centralised data	751	27%
Centralised data + complementary data collection	1,102	40%
Direct survey	752	27%
Indirect survey	163	6%
Total	2,768	100%

AND-International (2012), Value of production of agricultural products and foodstuffs, wines, aromatised wines and spirits protected by a geographical indication, Commissioned by the European Commission (tender no. AGRI-2011-EVAL-04),  
[http://ec.europa.eu/agriculture/external-studies/2012/value-gi/final-report\\_en.pdf](http://ec.europa.eu/agriculture/external-studies/2012/value-gi/final-report_en.pdf)



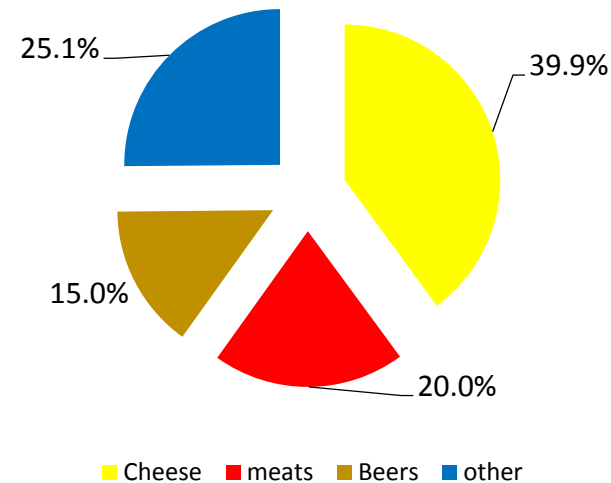
# Foods: sales value, 2010

GI labelled food (and beer) production: €15.8 b  
total production (food and beers) €277.0 b

**GI label share** of food and beer **5.7%**

**cheeses,  
processed meats  
beer**

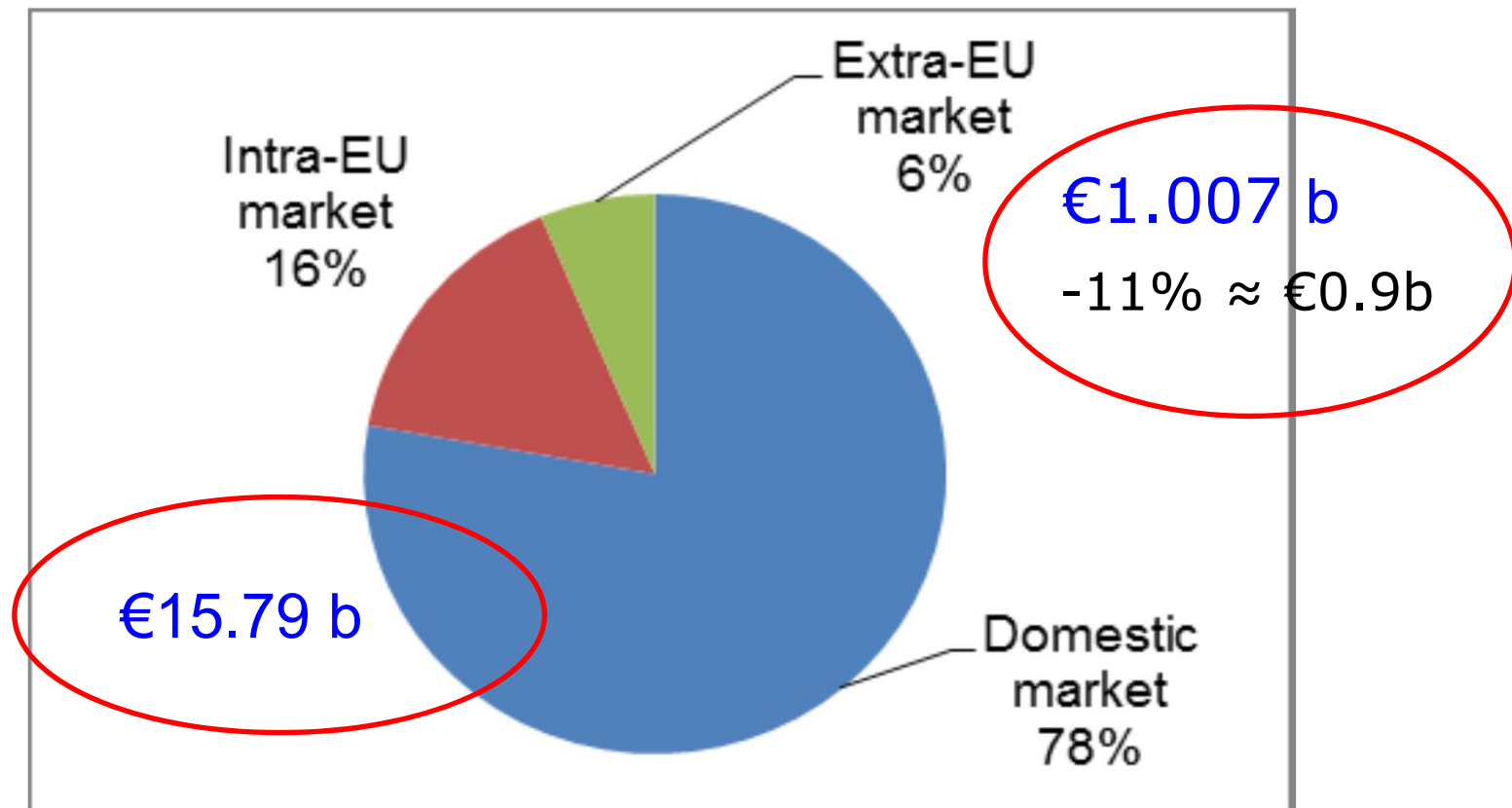
dominate – 75% of sales value



Source: AND-International (2012),  
[http://ec.europa.eu/agriculture/external-studies/2012/value-gi/final-report\\_en.pdf](http://ec.europa.eu/agriculture/external-studies/2012/value-gi/final-report_en.pdf)



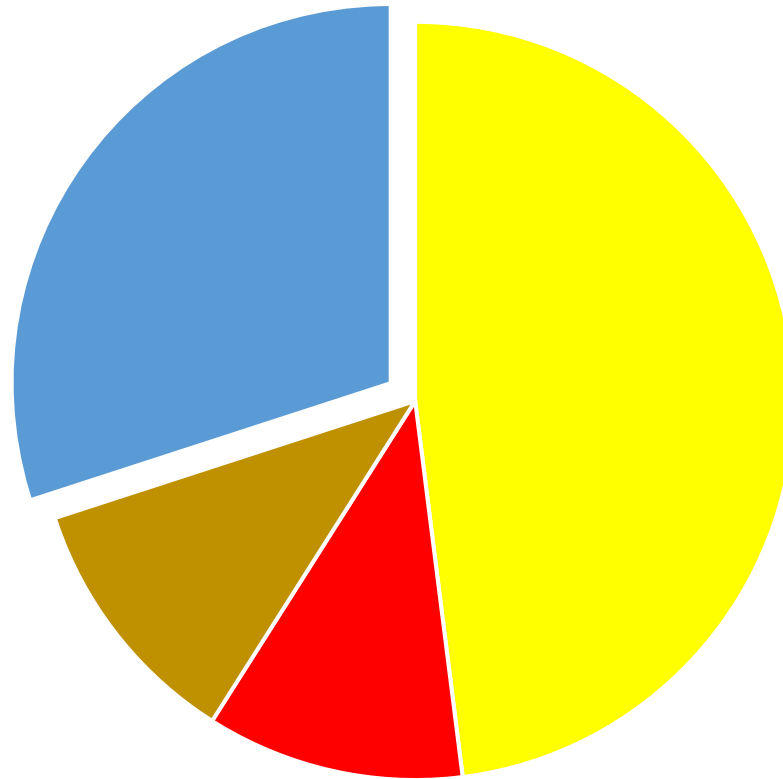
# GI foods: by destination, 2010



Source: AND-International (2012), Figure 26 [11% of exports to Switzerland]



# GI food exports beyond Europe 2010



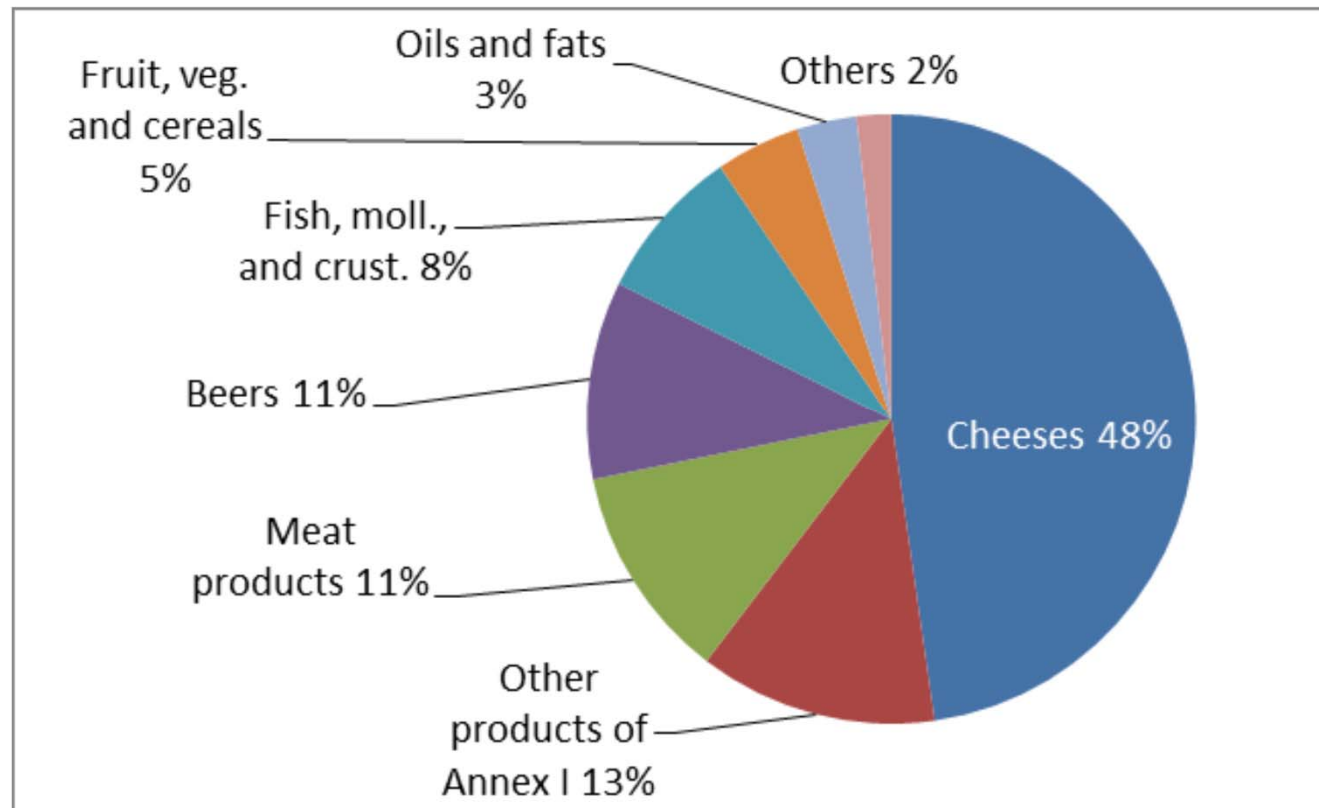
Cheeses:  
€483 m

Meat products:  
€111 m

Beers:  
€111 m

Other:  
€302 m

# GI food exports beyond Europe 2010





# European GI food exports: 2010

- GI labelled food/beer exports €1b
- GI labelled food exports by product:
  - 48% cheeses; 11% meats; 11% beers
- GI labelled food exports origin:
  - 62% Italian; 10% German; 9% UK
- Main extra-Europe markets:
  - USA (48%) Canada (6%), Japan (4%)

Sources: AND-International (2012),  
Observatory of Economic Complexity (<http://atlas.media.mit.edu/en/profile/hs92/0406/>)



# EU and the global cheese market

- Global cheese market:
  - US\$25.4b (2016)
  - EU has 81% share (approx US\$ 20.5b – 2016)
  - EU GI-labelled value - €483m (2010) [≈US\$580m]
    - about 2.3% of global cheese sales
    - about 2.8% of EU cheese exports

Sources: AND-International (2012),  
Observatory of Economic Complexity (<http://atlas.media.mit.edu/en/profile/hs92/0406/>)



# The EU's GI cheeses: 2010

- GI labelled food (and beer) production: €15.8 b
- €6.3b total cheese sales value ( $\approx$  40%)
- GI labelled cheese was 10% of production volume
- 90% of sales value from Italy, France and Greece
  - IT: mainly Grana Padano and Parmigiano Reggiano
  - FR: 38% from Comté, Roquefort, Reblochon
  - GR: mainly feta

Sources: AND-International (2012),

# GI vs non-GI cheeses: 2010

- IT: 38% national production GI labelled
- FR: GI cheese 10% national cheese sector
- GR: GI cheese 54% of national cheese production
- Denmark, Spain, Austria
  - between 5 and 7 % national output

Sources: AND-International (2012),

# The EU's GI meats: 2010

- total GI labelled foods sales: €15.8 b
- GI meat products sales value €3.2b ( $\approx 20\%$ )
  - 74% value cured meats
  - 26% value cooked meats
- Share of EU GI meats sales value
  - 59% from Italy (of which 87% from 4 of 32 GIs)
  - 22% from Germany (of which 60% from 3 of 8 GIs)
  - 11% from France
  - 8% other 24 MSs

Sources: AND-International (2012),



## GI vs non-GI meats: 2010

- IT: 26% national production cured meats GI labelled
- DE: 3.6% cured and 2.8% cooked had GI labelling
- FR: 3.4% cured and 1.5% cooked had GI labelling
- ES: 4.4% cured had GI labelling  
(cured meats 99% of meat product sector)

Sources: AND-International (2012),

# The EU's GI beer: 2010

- total GI labelled foods sales: €15.8 b
- GI beer sales value €2.4b ( $\approx 15\%$ )
  - Germany 95% sales value
    - 91% from 4 of the 12 registered GIs
  - Czech Republic 5% sales value
    - 3 of the 9 GIs had 92% of sales value
  - UK  $<0.1\%$  sales value
    - 2 registered GIs

Sources: AND-International (2012),

# Concentration of value

- Italy: 38% of the €15.8b value
  - cheeses and meat products
- Germany: 21% of value, mainly beer
- France: 19% of value, mainly cheeses
- Overall 58% from Italian cheese, German beer, Italian meats and French cheeses

Sources: AND-International (2012),



# Key lessons on GI foods

- GI market is not large (c 6% of market)
- It is highly concentrated
  - by product type: cheese, meat, beer
  - by country: Italy, Germany, France
  - by export destination: USA



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