



## oriGIn "GI Trends" Panel 2022 Survey

Monitoring the major trends  
affecting, and the sentiment of, GIs  
worldwide through a panel  
of selected GI groups



# oriGIn

## The global alliance of GIs

oriGIn is the global alliance of GI groups and institutions dedicated to:

- Campaigning for robust protection of GIs in national laws and international treaties; and
- Promoting a model of managing value chains which is poised to respond to the emerging economic, social and environmental challenges.



# “GI Trends” Panel

oriGIn is glad to launch its “GI Trends” Panel, with the objective to monitor, on a yearly basis, the major trends affecting, and the sentiment of, GIs worldwide.

The 2022 “GI Trends” Panel is composed by **21 GI groups** (not exclusively oriGIn’s members) from **13 countries** and **5 continents**, representing some of the most relevant GIs in terms of turnover and export **worldwide** in the agricultural, wines, spirits and craft sectors.

The 2022 is the survey first edition. For future ones, the oriGIn “GI Trends” Panel will be open to additional groups.





# 2022 panel of GI groups (in alphabetical order)

GI Group	Country
Bayerischer Brauerbund e.V.	Germany
Bureau national interprofessionnel du Cognac	France
Comité Champagne	France
Comité Interprofessionnel de Gestion du Comté	France
Consejo Regulador del Tequila A.C.	Mexico
Consejo Regulador Jijona y Turrón de Alicante	Spain
Consorzio del Prosciutto di Parma	Italy
Consorzio di Tutela Aceto Balsamico di Modena	Italy
Consorzio di Tutela della DOC Prosecco	Italy
Consorzio di Tutela Grana Padano	Italy
Consorzio di Tutela Parmigiano Reggiano	Italy

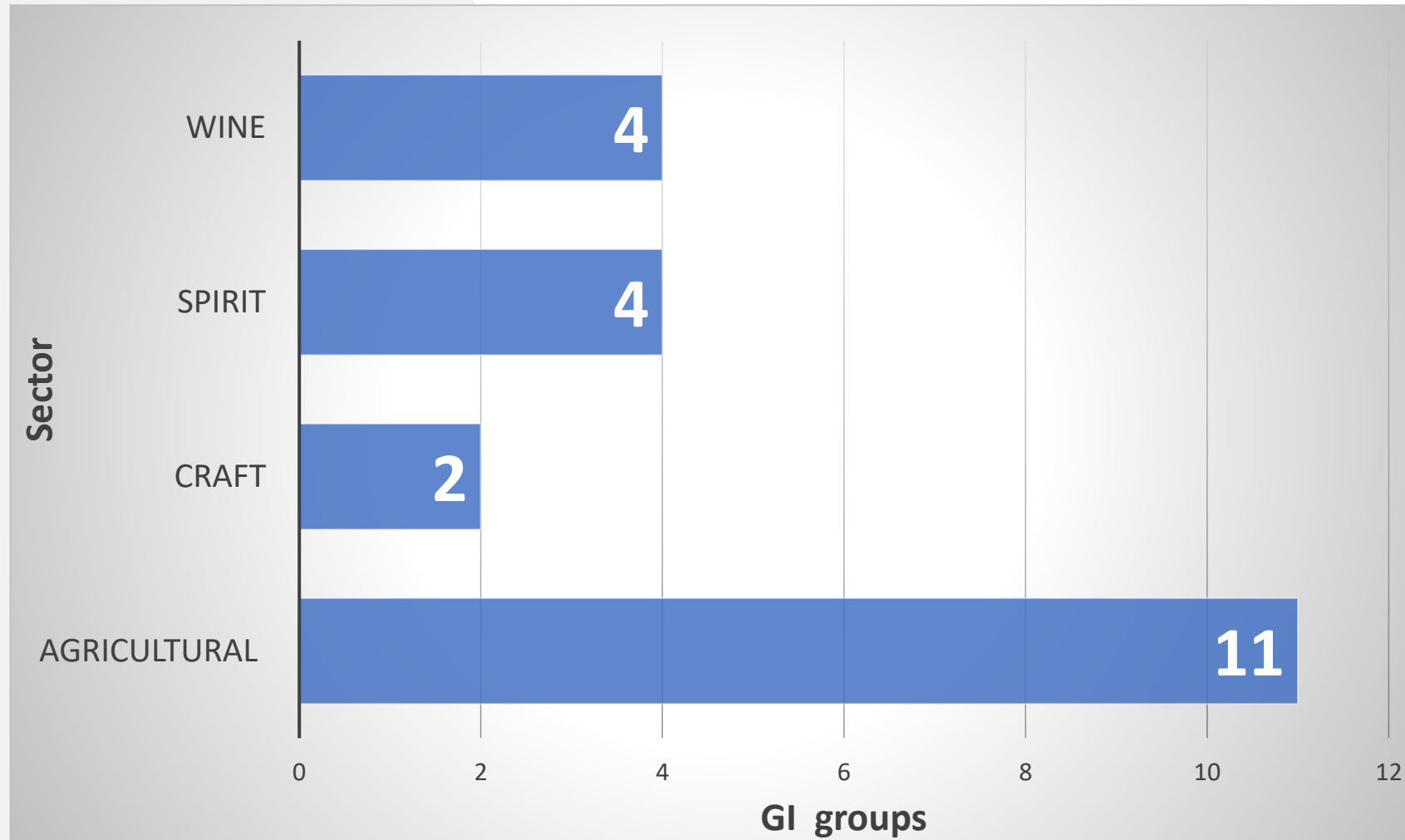


# 2022 panel of GI groups (in alphabetical order)

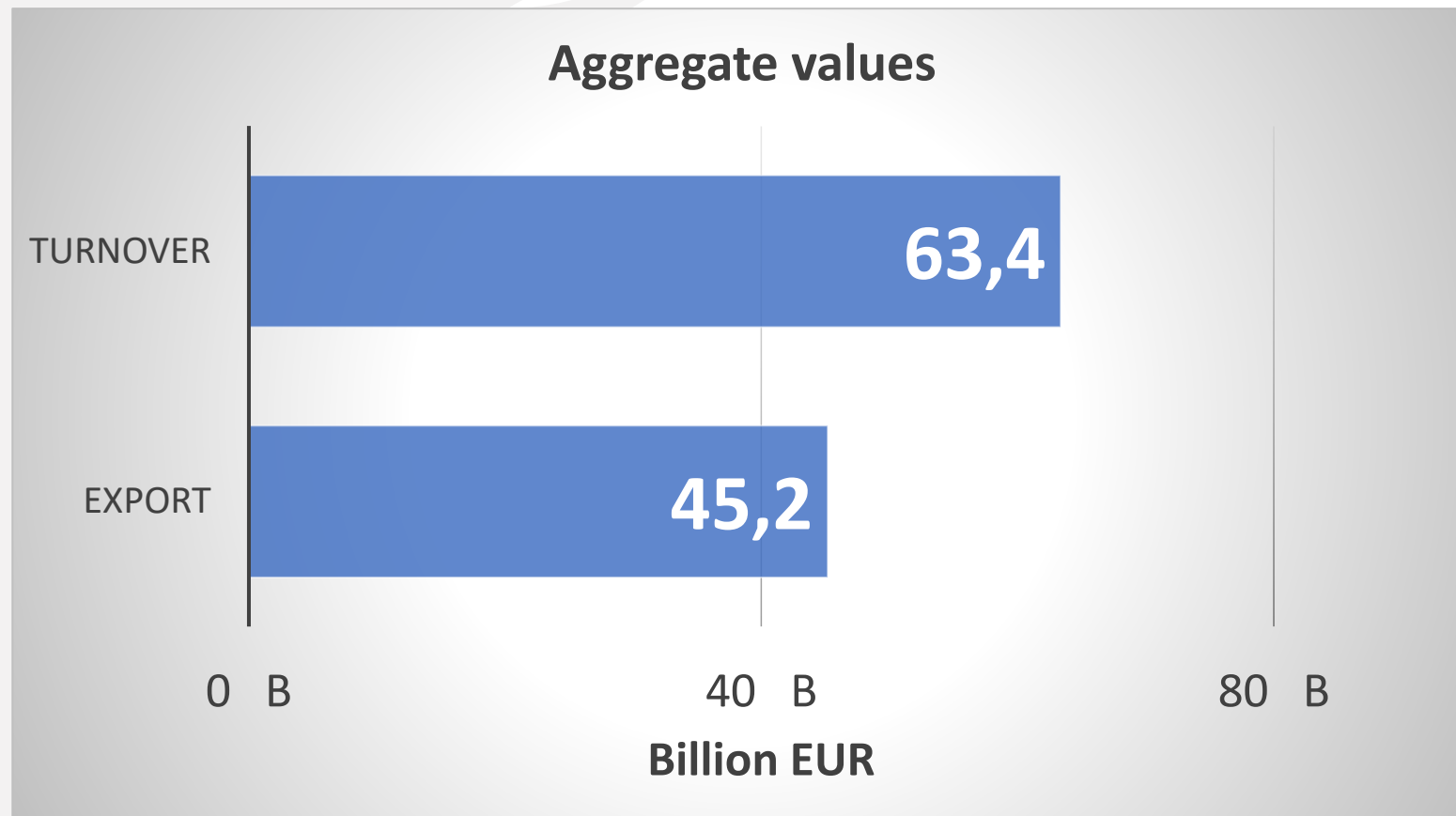
GI Group	Country
Corporación Habanos S.A	Cuba
Federation of the Swiss watch industry	Switzerland
Hangzhou Xihu Longjing Tea Co	China
Idaho Potato Commission	USA
Instituto dos Vinhos do Douro e do Porto	Portugal
Interprofession du Gruyère	Switzerland
Irish Whiskey Association	Ireland
Napa Valley Vintners	USA
SA Rooibos Council	South Africa
Scotch Whisky Association	UK



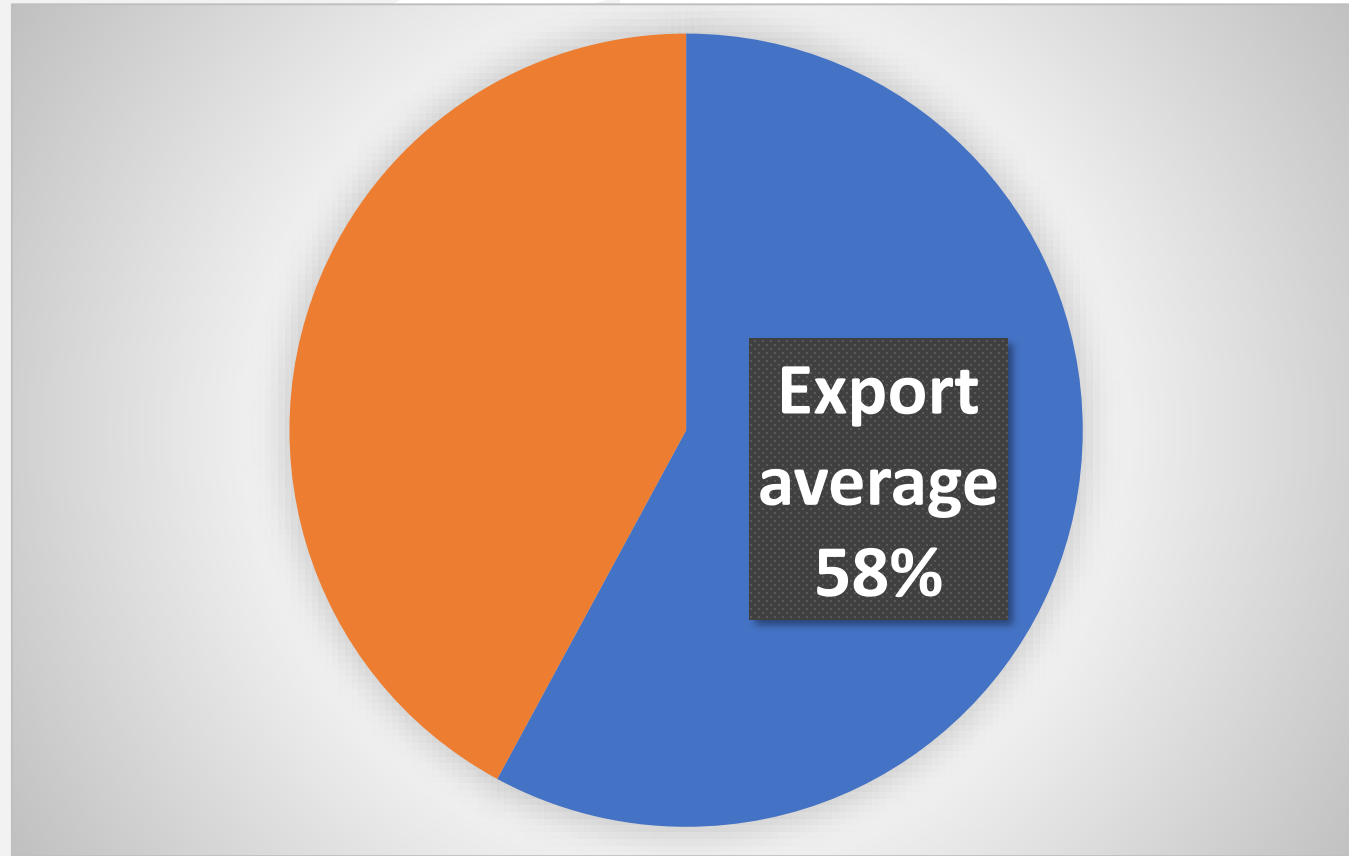
# “GI Trends” Panel representativeness (per sector)



# Aggregate turnover (at production level) & export represented by the “GI Trends” Panel (2021 data, in EUR)



# Export as % of the overall turnover (2021 data)





# “GI Trends” Panel objectives

Strengthening the common identity of GIs worldwide as well as supporting targeted and needs-based advocacy campaigns.



# Survey methodology

The survey contains 5 core questions on economic trends and expectations as well as 5 others formulated every year depending on the international economic scenario.

For the second category of questions, the 2022 edition of the survey focuses on the post-covid scenario and sustainability issues.

In the 2022 survey, answers reflect 2021 economic data as well as the sentiment in early 2022, compared to 2021.





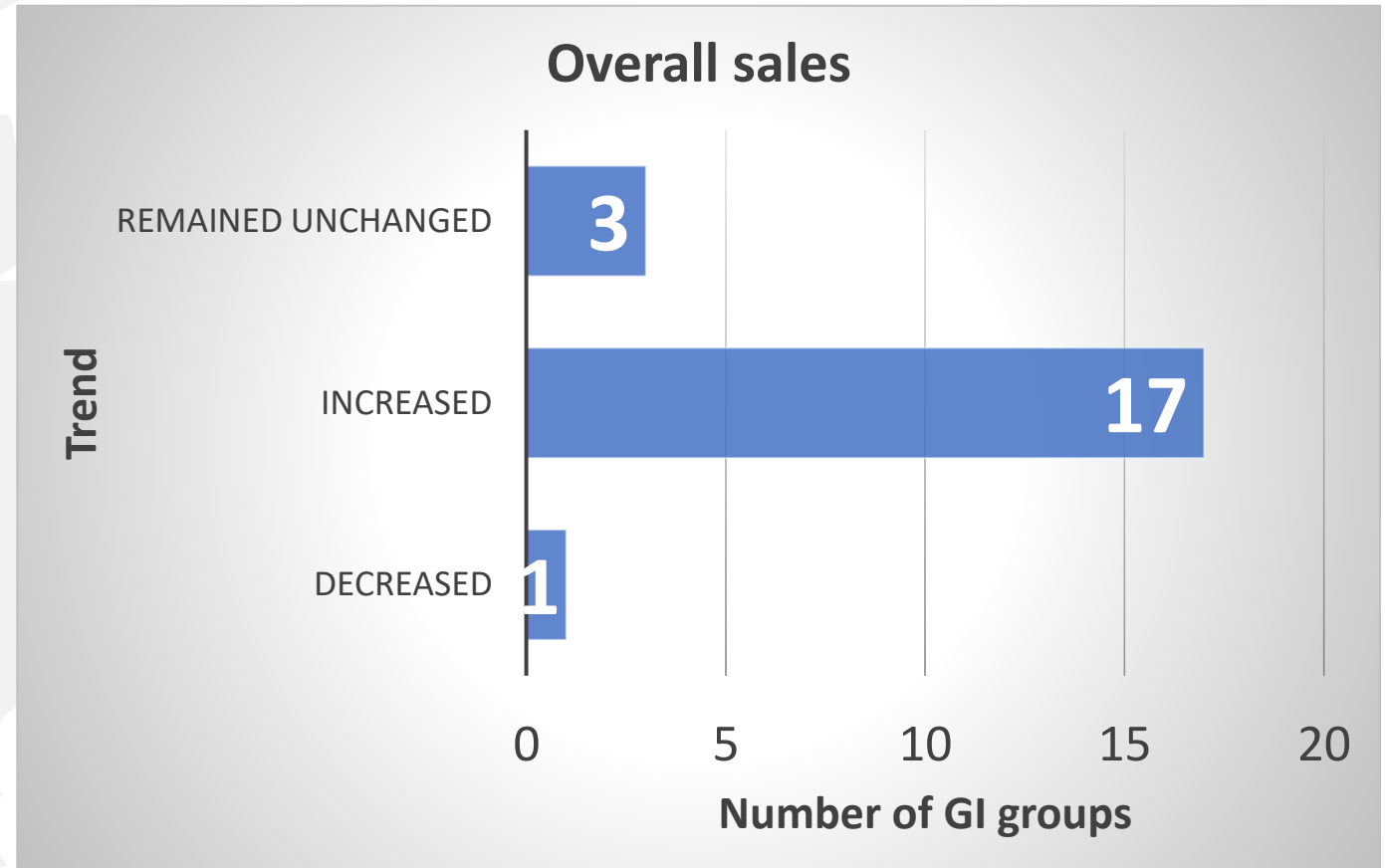


Trends affecting, and  
sentiment of, GIs  
worldwide

## Question:

Compared to 2020, in 2021 the overall sales of the GI you represent have

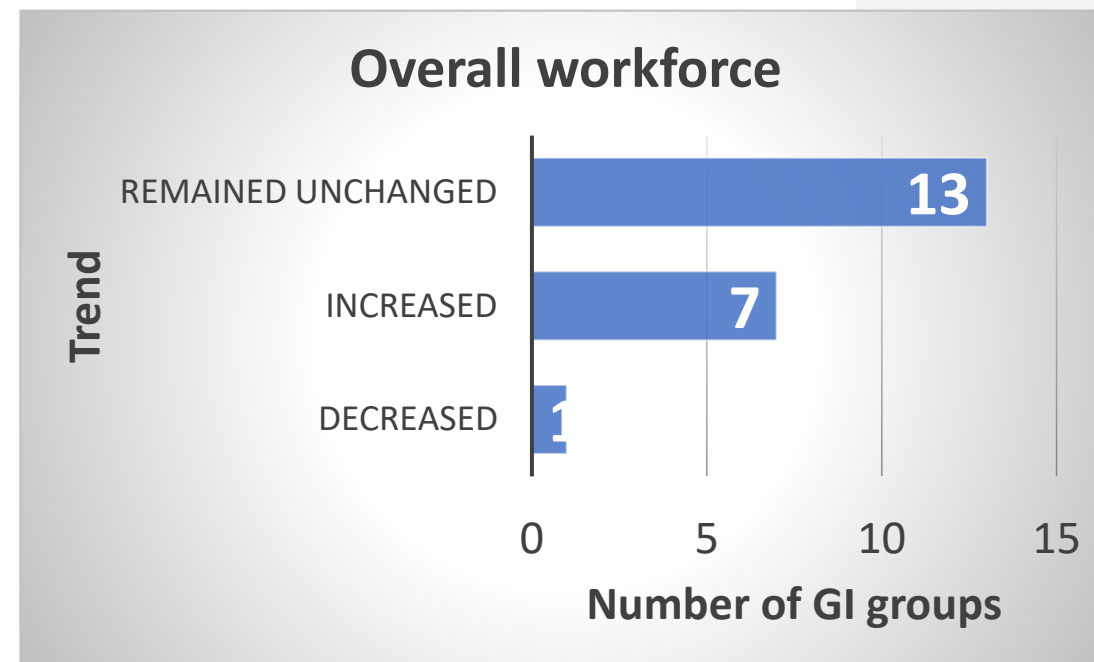
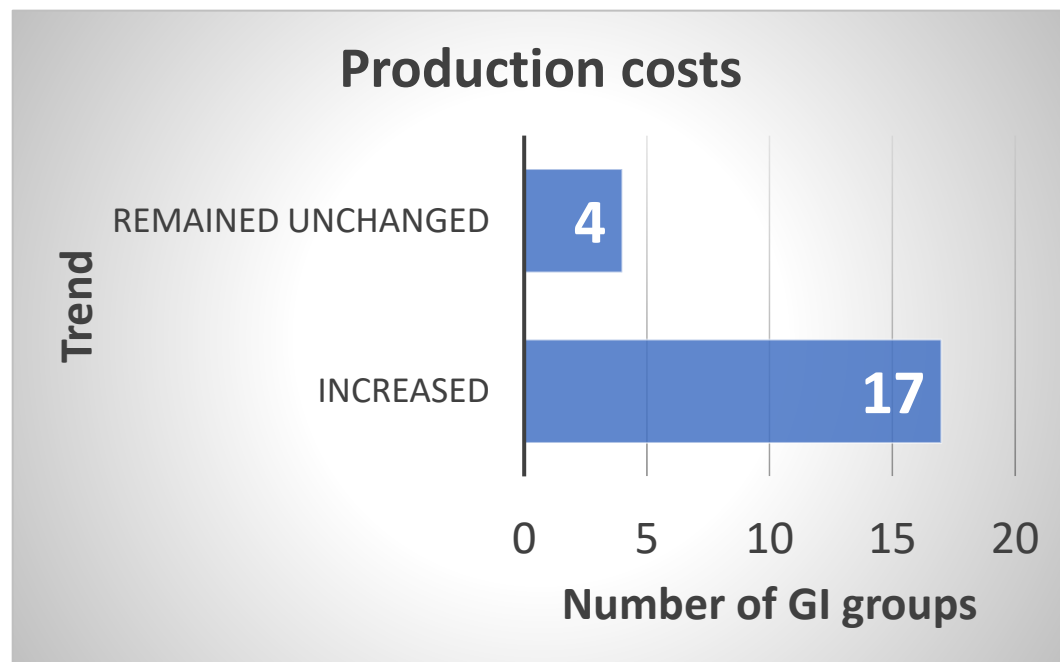
In an international landscape characterized by the Covid-19 crisis, the GI sector remained fundamentally solid, scoring interesting sale performances in 2021.





## Question:

Compared to 2020, in 2021 within your GI value chain



An overall increase in production costs in 2021 seems not to have impacted negatively – and rather reinforced – the link between GI products and their respective territories.

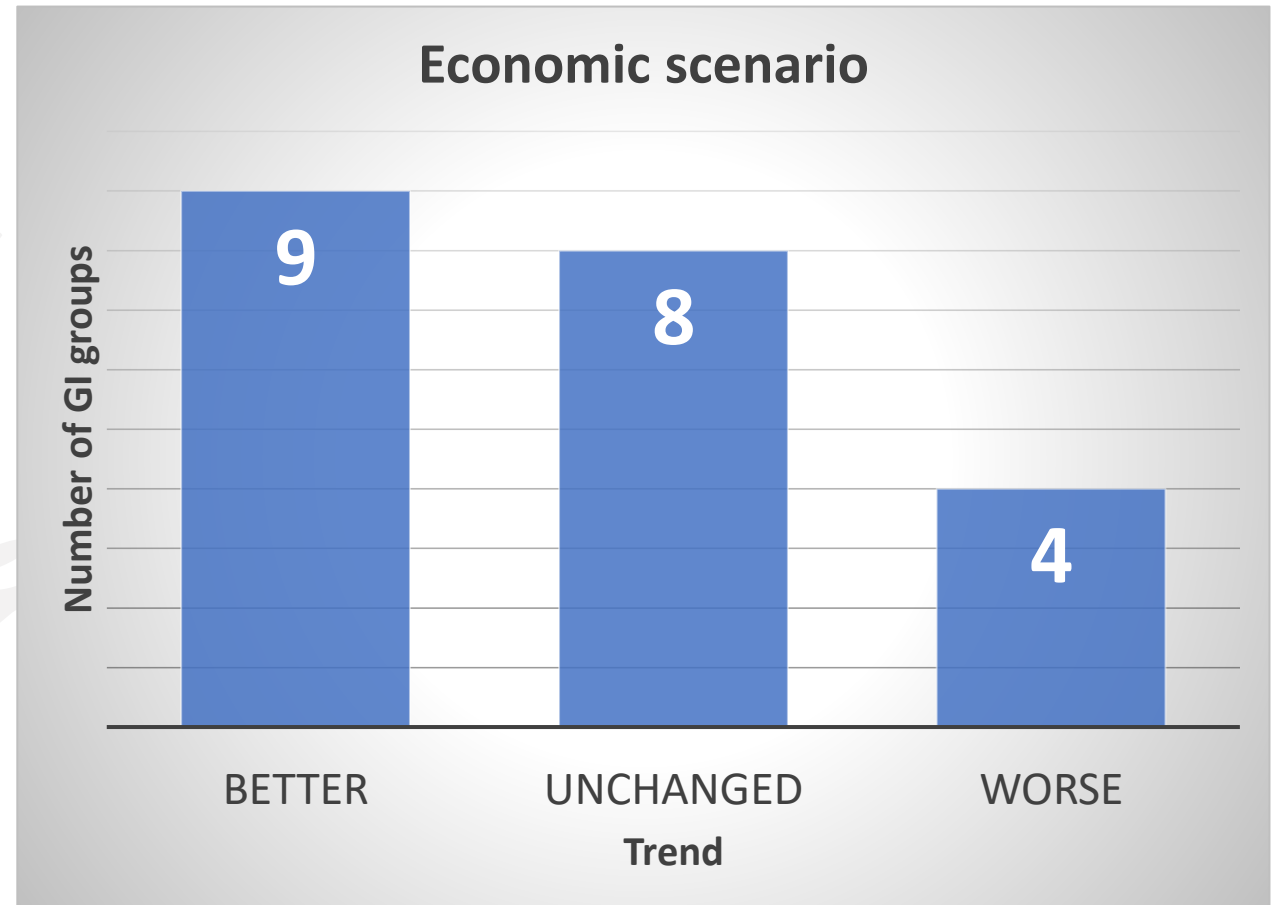
It will be interesting to assess though - in 2023 survey - the impact inflation and energy costs had on production and workforce costs in 2022.

## Question:

Compared to 2021, for the GI you represent the 2022 economic scenario looks

In spite of the global economic uncertainties, the GI sector looked at 2022 mainly with optimism.

This could partly be explained by the fact that raising inflation and energy costs manifested their effects later in 2022.

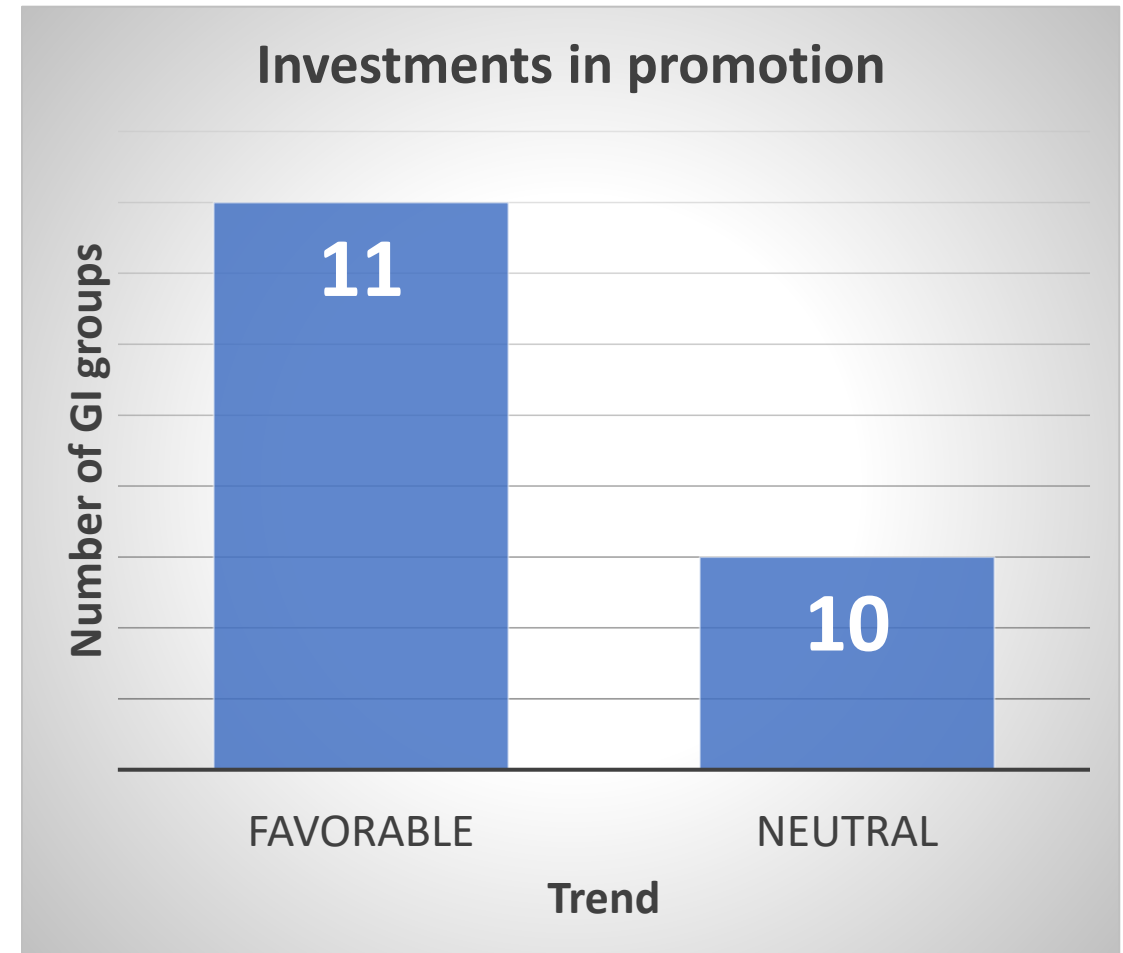




## Question:

Compared to 2021, for investments in promotion by both the GI group and its members, 2022 looks

In spite of the global uncertainties, 2022 was seen as positive year for investments. This shows how GIs tackle crisis with a long-term perspective, looking at opportunities to consolidate markets, rather than merely cutting costs.



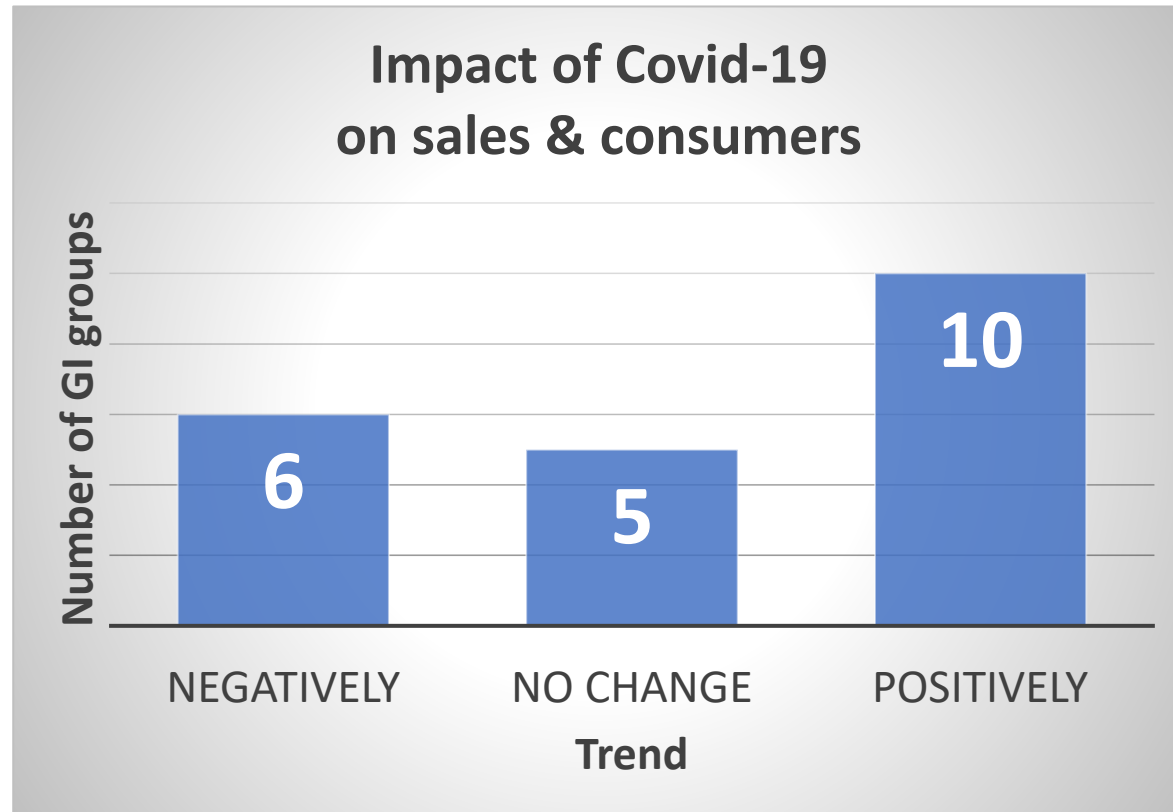


COVID-19 Impact



## Question:

How has COVID-19 impacted on the GI you represent in terms of sales and perception of consumers?



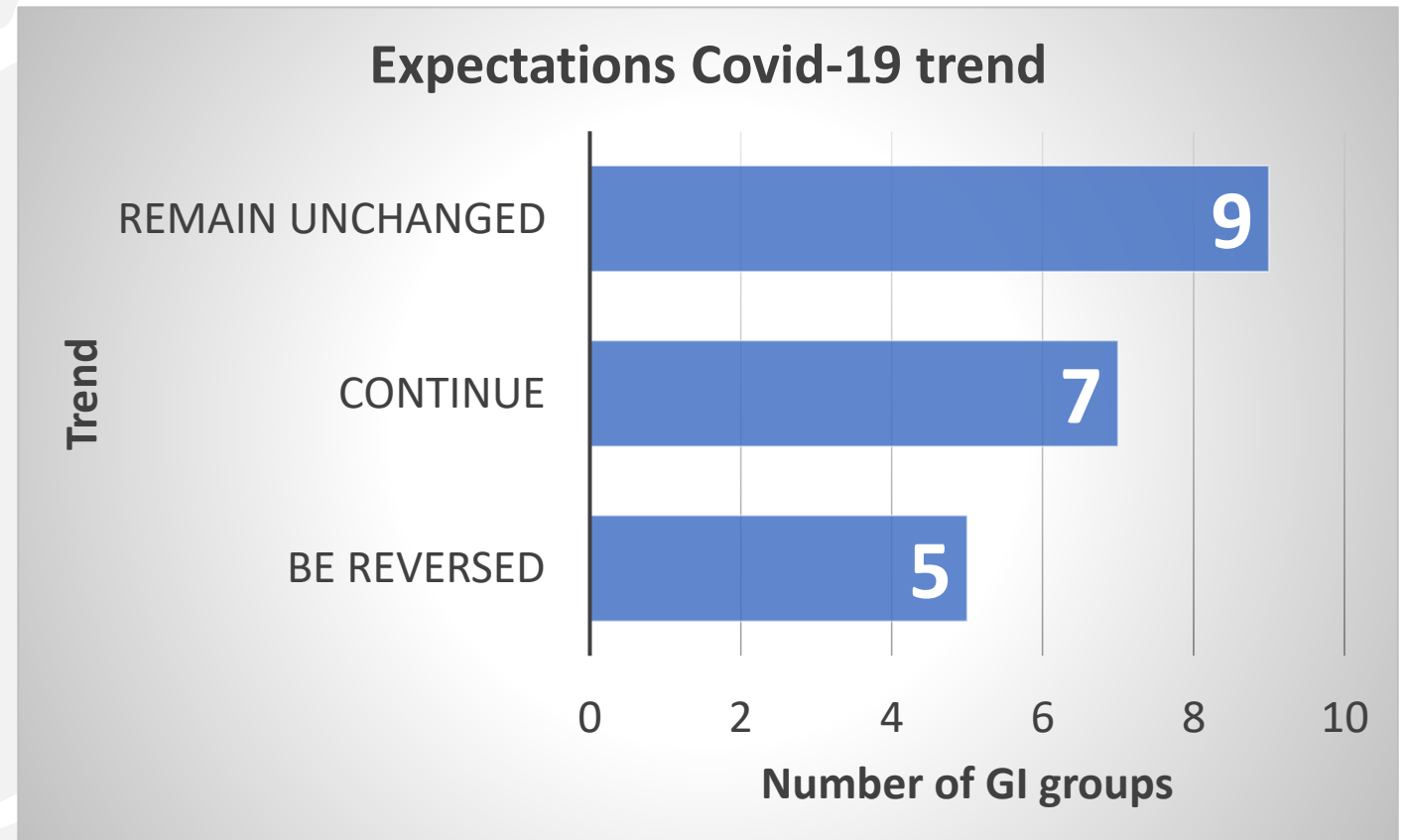
Covid-19 has had mainly a positive or neutral impact on GI products sales.

This could be explained with raising sustainability concerns by consumers, who largely see GIs, with their impact on local development, controls and preservation of traditions, as sustainable products.

## Question:

Do you expect this trend to continue or be reversed in the following years?

With a few differences of perception within the panel, the Covid-19 issue is considered by the “GI Trends” Panel a variable “under control”. For the majority of interviewed groups, the impact it had on sales and perception of consumers will remain unchanged or continue in the following years.







Sustainability



# Do you expect a discussion on sustainability taking place within your value chain in the near future (1 to 2 years)?

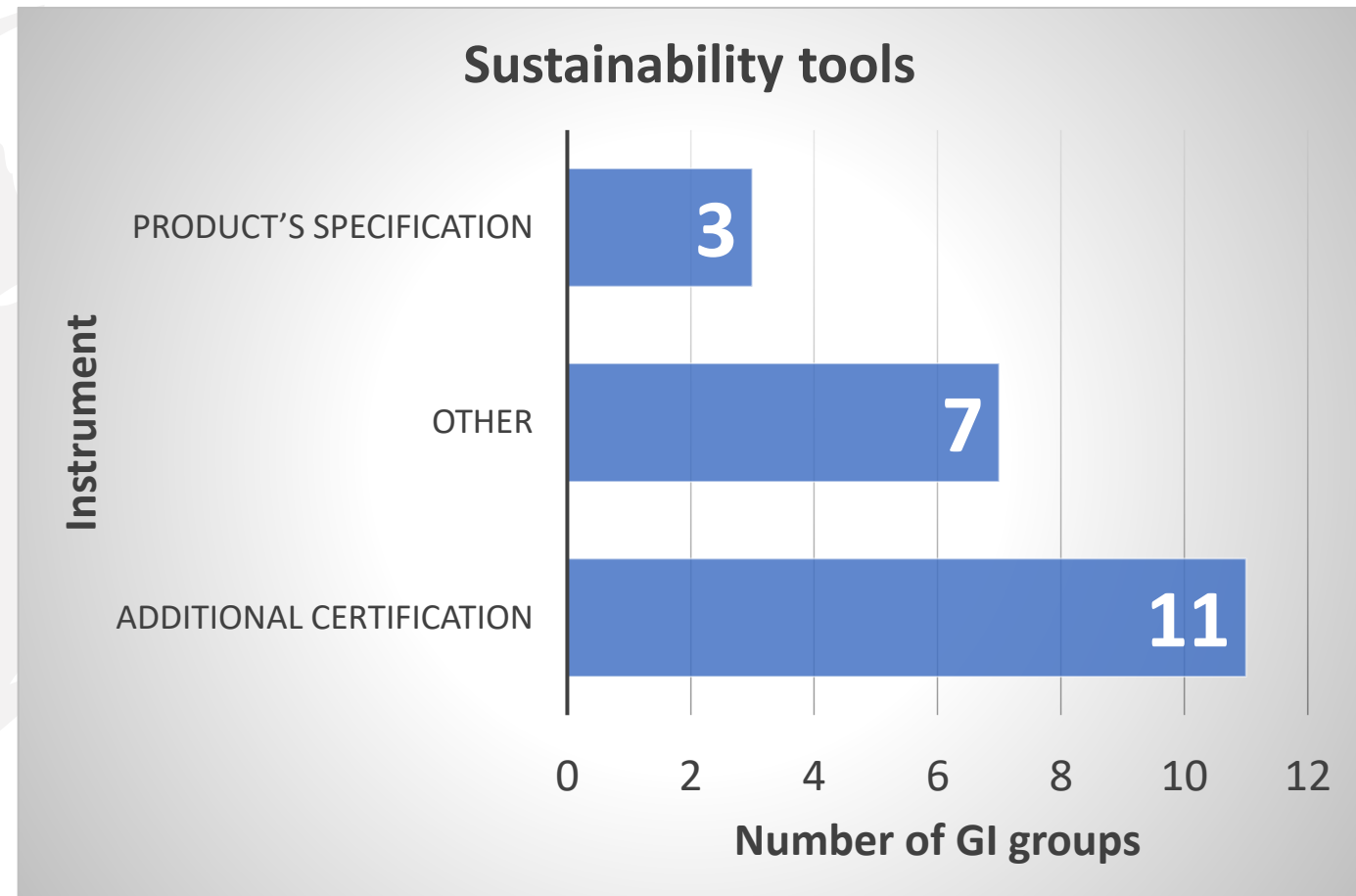
While GIs are essentially in line with several economic, social and environmental components of sustainability, there is consensus within the “GI Trends” Panel on the need to further addressing the issue, to respond to increasingly demanding consumers.





# If yes, which tool do you expect to be used to address sustainability challenges?

Various tools are envisaged to pursue the objective of achieving further progress on sustainability.



# Some conclusions

- I. The 2022 “GI Trends” Panel – composed of **21 GI groups** representing **63.4 billion EUR of aggregate turnover** & **45.2 billion EUR of export (58%)** - confirms the tremendous socio-economic impact of GIs worldwide
- II. At the beginning of 2022, expectations were positive or neutral for the vast majority of groups
- III. This could be explained in light of several factors:
  - The encouraging sales data registered in 2021
  - The GI sector tackles crisis with a long-term perspective, looking at opportunities to consolidate markets, rather than merely cutting costs
  - Survey conducted in the first part of 2022





# Some conclusions

- IV. For the majority of the interviewed GI groups, Covid 19 had had a positive or neutral impact on sales
- V. This could be explained with raising sustainability concerns by consumers, who largely see GIs, with their impact on local development, controls and preservation of traditions, as sustainable products
- VI. There is consensus within the “GI Trends” Panel on the need to further addressing sustainability & achieving incremental progress, to respond to increasingly demanding consumers





# Towards the 2023 survey

- It will be conducted in the first quarter of 2023 and presented by June
- Core questions on overall economic sentiment will remain in the survey first part
- Focus on inflation and energy prices impact in the survey second part
- It will be possible to compare data with 2022 and start to analyze potential paths







Organization for an International  
Geographical Indications Network

oriGIn represents today some 600 GIs groups and institutions in the sectors of agriculture, wines, spirits and craft products, from 40 countries.

Join us if you wish to engage in protecting and adding value to, distinctive geographical names as well as responding to the emerging sustainability challenges faced by them.

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