



Organization for an International  
Geographical Indications Network

# oriGIn Survey 2023

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



# oriGIn - The global alliance of GIs

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

- Campaigning for robust GI protection 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.



# GIs: From the local to the global in a sustainable way

GI are a global concept (more than 10,000 names recognized worldwide).

GIs enhance product value, increase market access and provide governance and economic opportunities for local value chains, while preserving ecosystems, knowledge and cultural diversity.

GIs represent an instrument for the sustainable development of regions.

GIs provide a vision for a more inclusive and sustainable development paradigm.



# The oriGIn “GI Trends” Panel

In 2022, oriGIn launched its “GI Trends” Panel, composed by the associations representing some of the most relevant GIs in terms of turnover and export.

It aims to monitor global trends and sentiment affecting GIs annually, while fostering a common identity as well as supporting targeted advocacy campaigns.





# 2023 Panel of GI groups (in alphabetical order)

GI Group	Country
Asociación "La Piel de Ubrique" - BYPIEL	Spain
Asociación nacional de fabricantes de alcoholes y licores de Guatemala	Guatemala
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

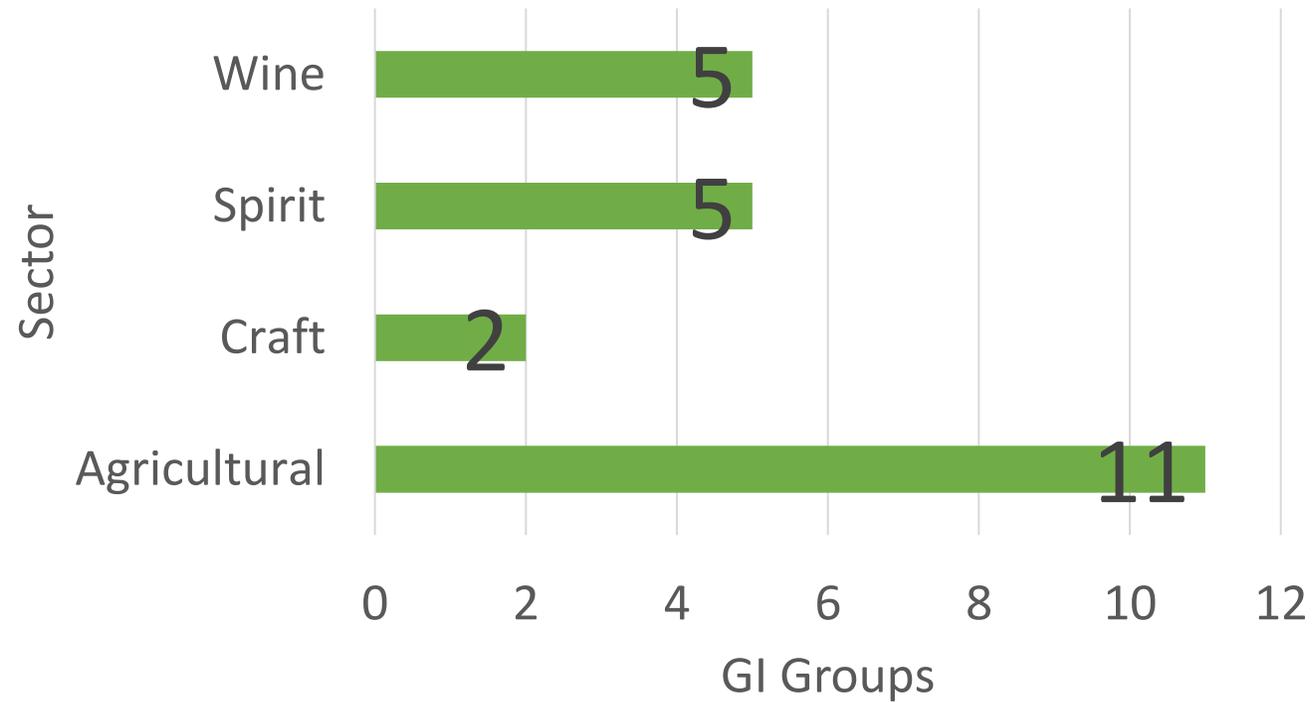


# 2023 Panel of GI groups (in alphabetical order)

GI Group	Country
Consorzio di Tutela Parmigiano Reggiano	Italy
Consorzio Vino Chianti Classico	Italy
Federación Nacional de Cafeteros de Colombia	Colombia
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
Scotch Whisky Association	UK



# The “GI Trends” Panel representativeness (per sector)





## 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.

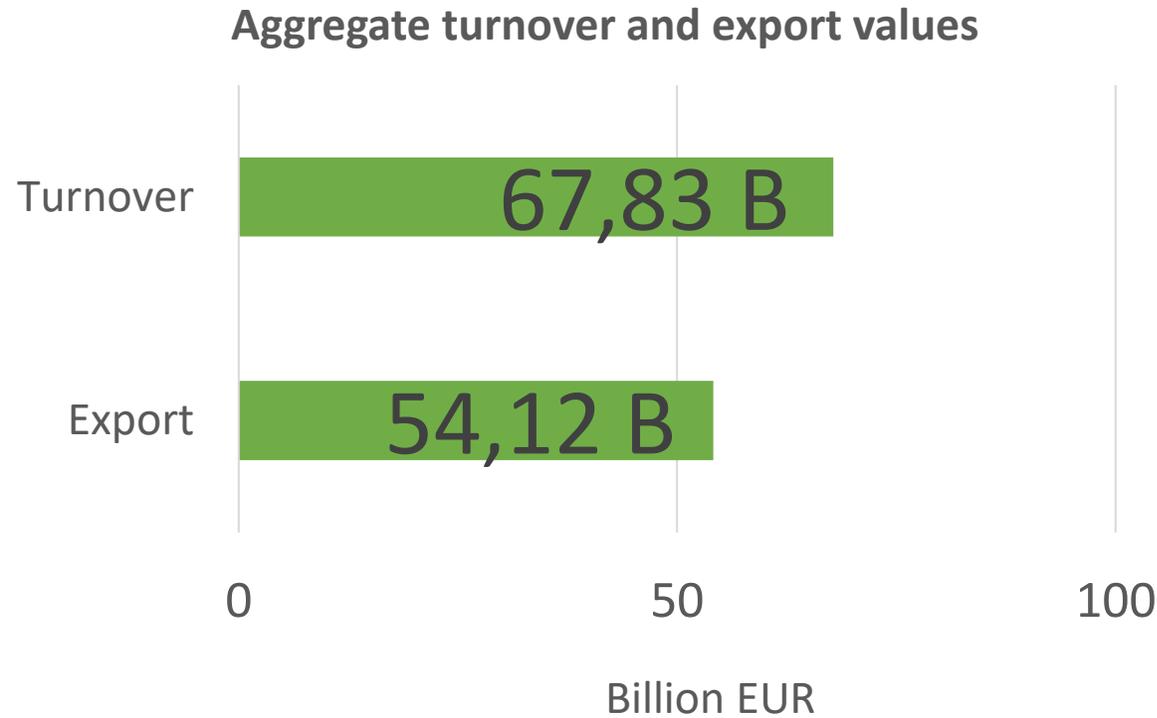
**The 2023 trend topic concerns high energy costs and inflation** (the 2022 edition of the survey focused on the post-covid scenario and sustainability issues).

In the 2023 survey, answers reflect 2022 economic data as well as the sentiment in early 2023, compared to 2022.

# Survey Results

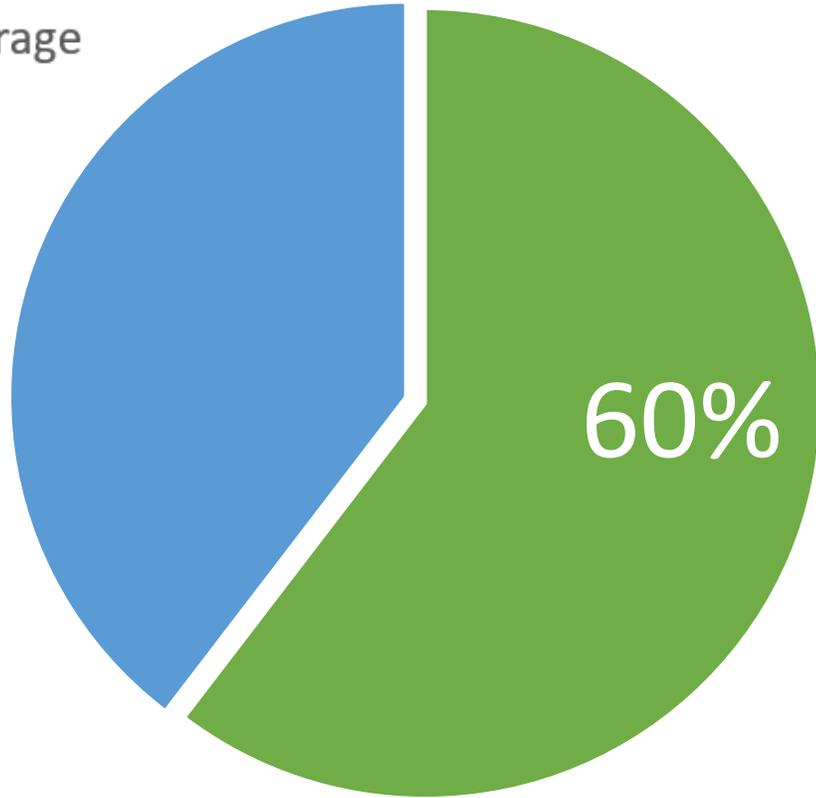


# Aggregate turnover (at production level) & export represented by the “GI Trends” Panel (2022 data, in EUR)



# Export as % of the overall turnover (2022 data)

■ Export average



Export average share is up to 60%!

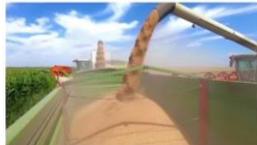
This demonstrates that GIs are expanding their markets and taking advantage of international trade opportunities.



# Direct jobs generated by the “GI Trends” Panel (2022 data)

419.433 (units)

- GIs support employment in agriculture, food processing and craft manufacturing.
- GIs offer job opportunities, which cannot be delocalized.
- Protecting and promoting GIs can lead to sustainable economic growth.



# The overall “GI Trends” Panel geographical area (2022 data)

593.671km<sup>2</sup>

- The overall geographical area of the 2023 Panel is larger than countries such as Spain or Germany.
- This shows the vast size of the GI regions, emphasizing their potential economic and cultural significance.





Trends affecting,  
and sentiment of, GIs worldwide

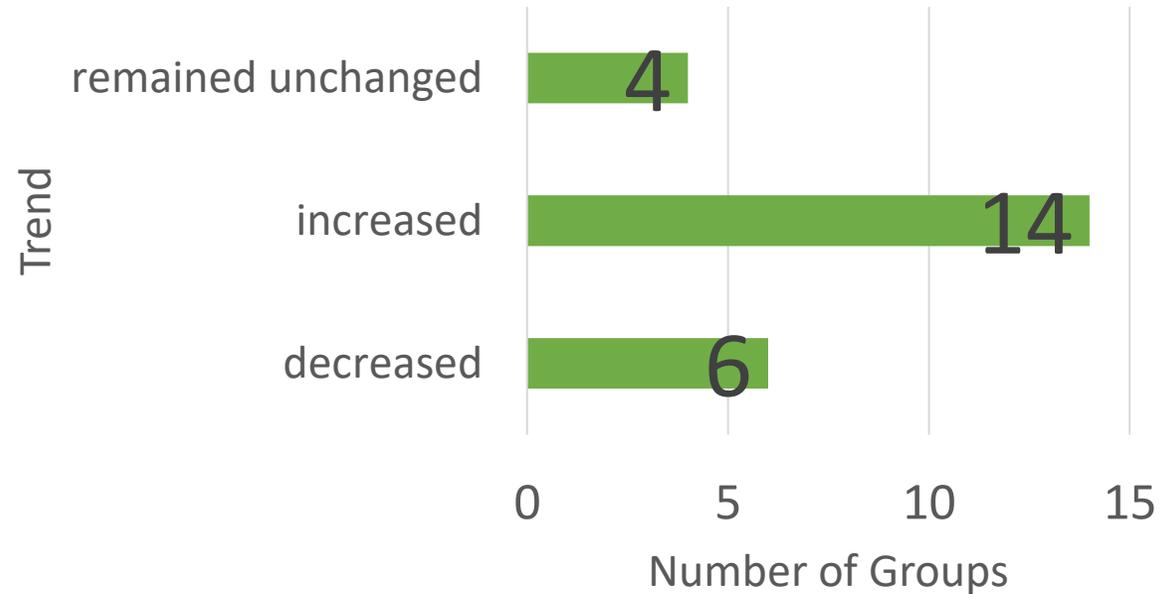


## Question

Compared to 2021, in 2022 the overall sales of the GI you represent have :

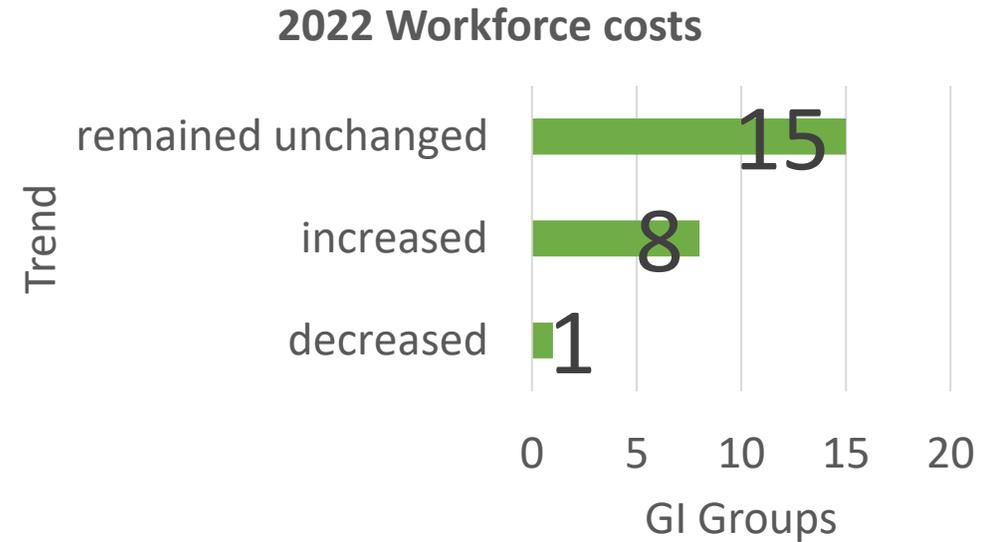
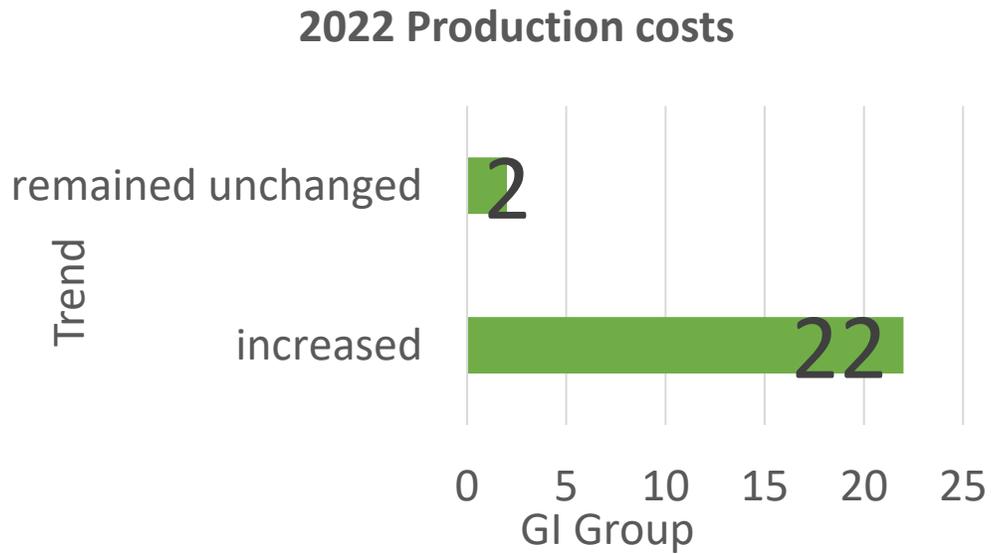
The GI sector maintained solid sales in 2022 despite high energy costs and inflation (only a few GIs have experienced a decrease from the previous year).

2022 GI Sector Sales Performance

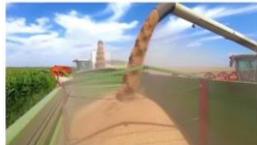


## Question

Compared to 2021, in 2022 the production and workforce costs within your GI value chain have :



Despite a general increase in production and workforce costs (already evident in 2021), the link with the GI territories and the local employment remains solid.

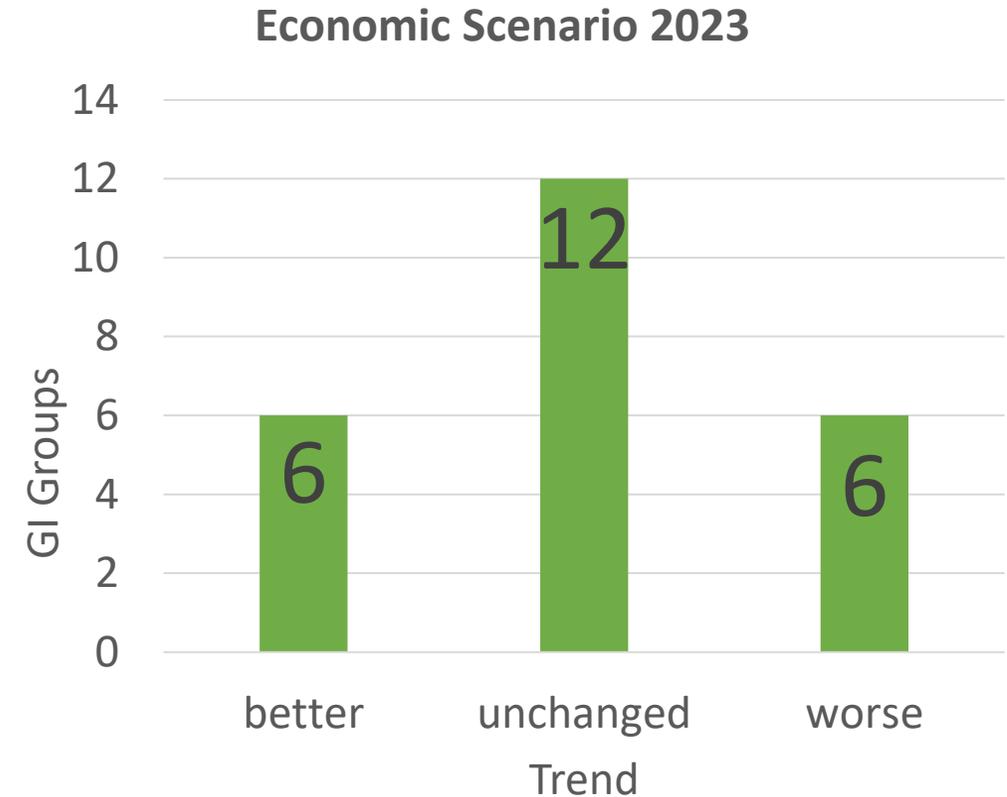


## Question

Compared to 2022, for the GI you represent the overall 2023 economic scenario looks :

The GI sector expects a stable economic scenario in 2023.

Given the remaining uncertainties though, monitoring the sector's economic performance remains crucial to adapt to evolving challenges.



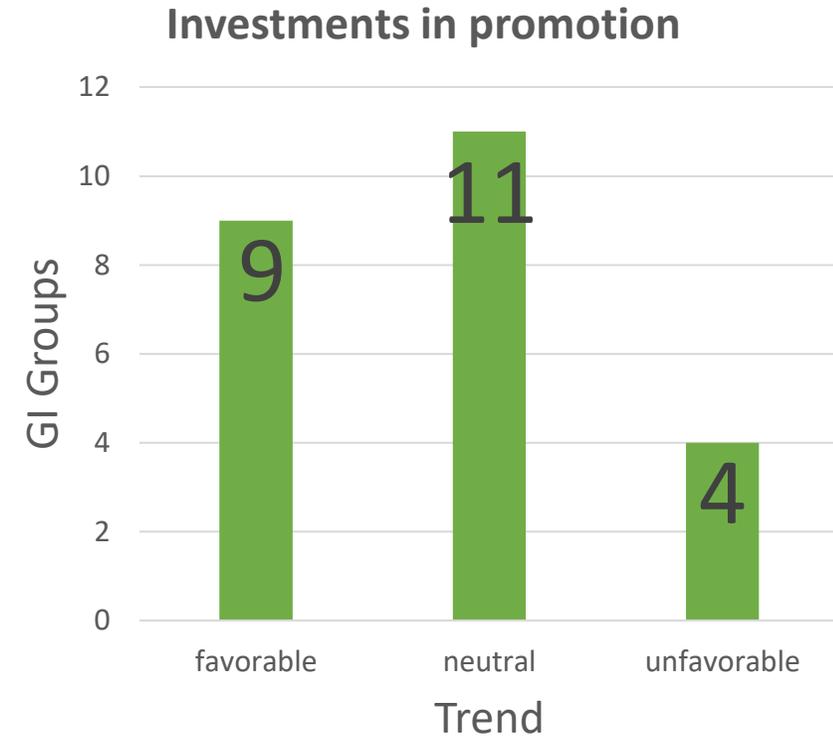
## Question

Compared to 2022, for investments in promotion by both the GI group and its members, 2023 is :

Despite global uncertainties, investments in promotion were positive in 2022.

This demonstrates the GI's long-term perspective in tackling crises.

A stable investment trend is also expected in 2023.





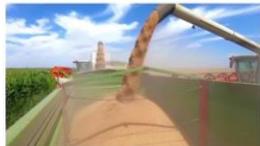
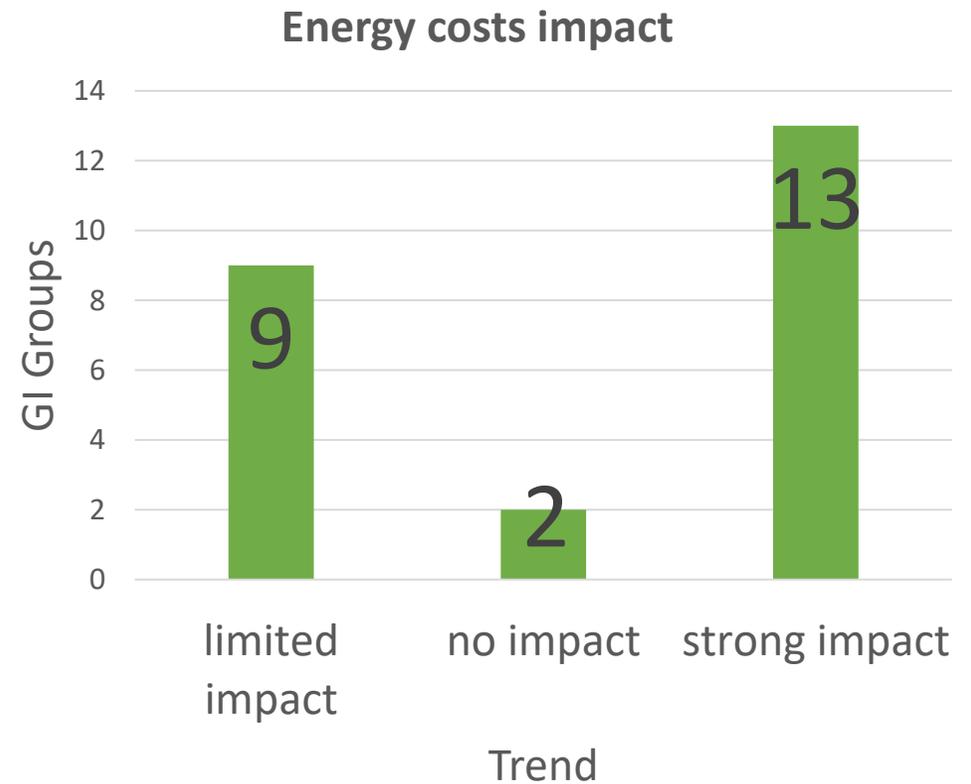
# High energy costs and inflation impact



Question:

In 2022, have high energy costs impacted on production costs and final price of the GI you represent?

Despite an overall increase in costs, the sector was to some extent able to mitigate the impact on the final price of GI products.

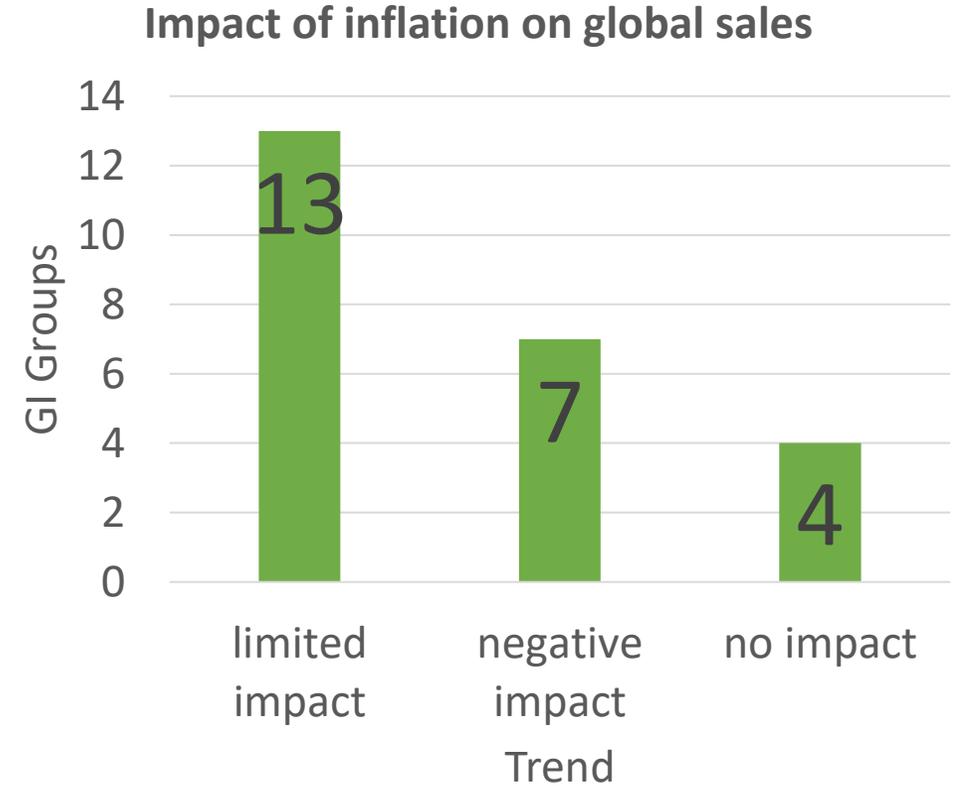


Question:

Has the 2022 high inflation impacted on the GI overall sales?

Despite high inflation, the overall sales in the GI sector remained stable in 2022.

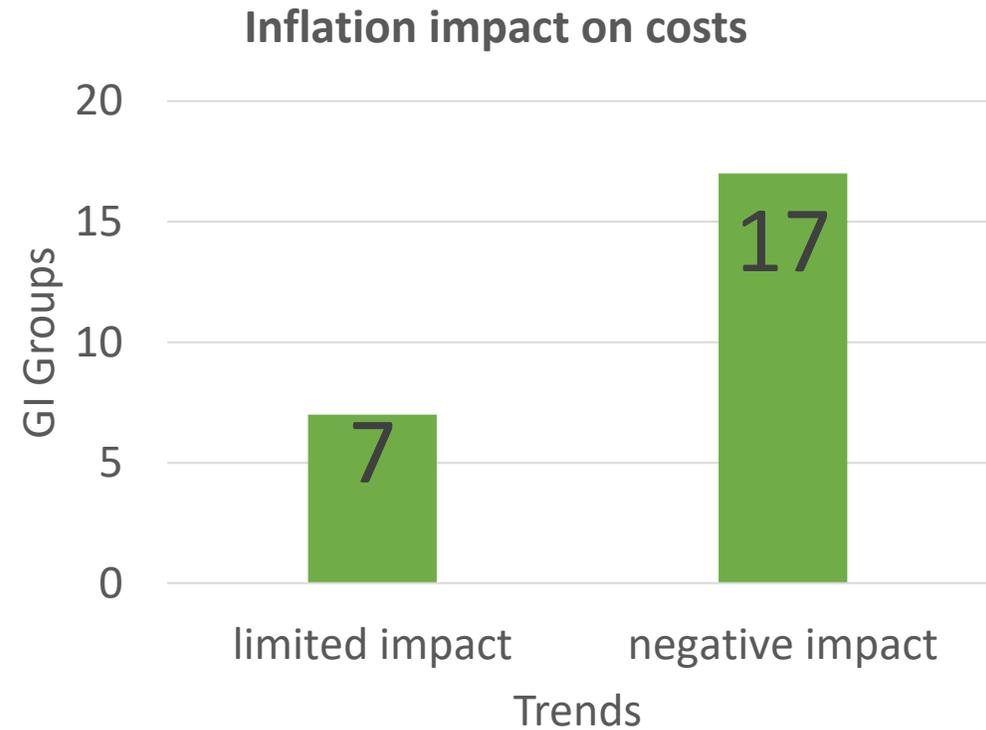
This shows the sector's ability to manage inflationary pressures and withstand economic challenges.



Question:

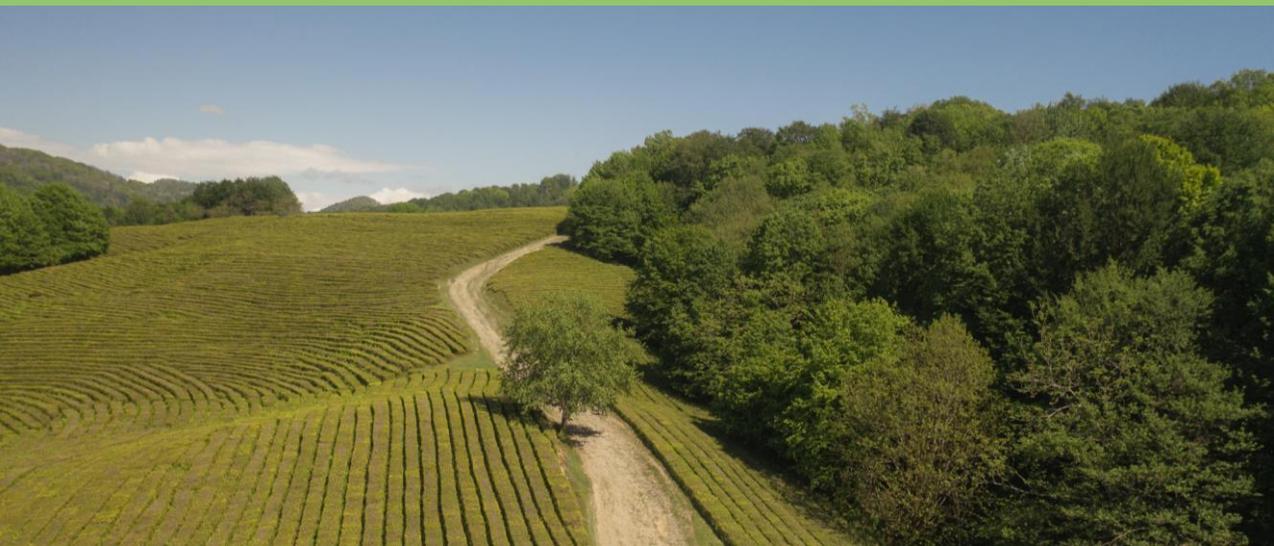
Has the 2022 high inflation impacted on the GI production costs?

Despite high inflation in 2022 impacting production costs, the GI system has proven to be resilient managing pressures and withstanding economic challenges.





# Expectations for 2023 and Conclusions

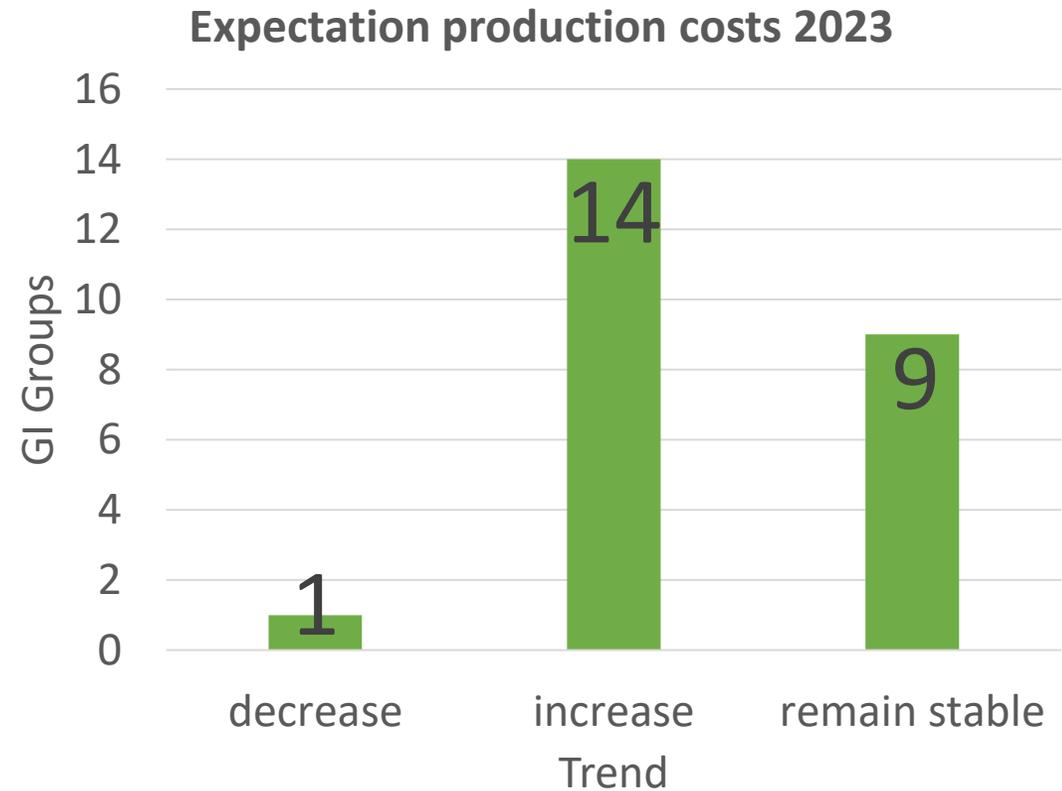


## Question:

In 2023, do you expect to production costs to :

The majority of respondents anticipate an increase in production costs.

With effective management and strategic planning, the sector can continue to thrive and generate sustainable economic growth.



Question:

Do you expect sales in 2023 will :

It is encouraging to see that a majority of respondents anticipate sales to remain stable or increase.

This suggests that despite economic uncertainties and challenges, the GI sector is expected to maintain its market position and competitiveness in the current year.



# Some conclusions

- I. The 2023 "GI Trends" Panel consists of **23 GI groups** representing a combined turnover of **67.8 billion EUR**, **54 billion EUR of export (60%)**, half a million direct jobs and some **600.000 km<sup>2</sup> of land**.
- II. These figures confirms the socio-economic impact of GIs globally and offers a glimpse into the worldwide impact of the **more than 10,000 GIs recognized worldwide**.
- III. GIs represent worldwide a tremendous tool for the socio-economic development of local value chains, offering meanwhile **a vision for a more inclusive a sustainable development paradigm**.
- IV. The **'open-source' nature of the GI system** – which has the potential to bring the local to the global in a sustainable way – **represents a valid alternative to protectionist trade models**.



# Some conclusions

- V. At the beginning of 2023, most groups expressed positive or neutral expectations, indicating a potentially stable economic environment (probably due to solid sales data in 2022).
- VI. The sector may continue to face challenges in the future, especially with an anticipated rise in production costs.
- VII. For the majority of the interviewed GI groups, while the impact of high inflation on GI production costs was significant in 2022, it was to some extent mitigated on the final price of products.



# Some conclusions

- VIII. By continuing to implement cost-saving measures, optimizing supply chains, and exploring innovative solutions, GIs can mitigate the impact of inflation and maintain their competitiveness in the long run.
- IX. The sector showed resilience and adaptability in a period of major economic challenges.**
- X. The long-term perspective – which is part of the GI nature and reinforced by its local governance – allows GI stakeholders to find pragmatic solutions and turn challenges into opportunities.**



# Towards the 2024 Survey

The upcoming 2024 survey is scheduled to take place during the first quarter of the year and will be presented by June.





Organization for an International  
Geographical Indications Network

oriGIn represents today some 600 GI 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.

More information: [www.origin-gi.com](http://www.origin-gi.com) - [info@origin-gi.com](mailto:info@origin-gi.com)



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