

A collage of images including a person in a hat, a bunch of white grapes, and a splash of water.

oriGIn “GI Trends” Panel 2024 Survey

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

The oriGIn “GI Trends” Panel

In 2022, oriGIn launched its “GI Trends” Panel, composed by 20 to 30 associations, including the ones representing some of the most relevant GIs worldwide in terms of turnover and export.

The survey aims to monitor, on a yearly basis, global trends affecting GIs, while strengthening their common identity and supporting targeted advocacy campaigns.



2024 Survey

The 2024 Panel covers **28 associations from 17 countries and 5 continents.**

They representing **some of the most relevant GIs in terms of turnover and export worldwide in the agricultural, wines, spirits and craft sectors.**



2024 Panel (in alphabetical order)

GI Group	Country
Asociación de Empresarios de la Piel de Ubrique	Spain
Asociación Nacional de Fabricantes de Alcoholes y Licores	Guatemala
Bayerischer Brauerbund e.V.	Germany
Bureau national interprofessionnel du Cognac	France
Comité Champagne	France
Comité Interprofessionnel de Gestion du Comté	France
Consejo Regulador Café Villa Rica	Peru
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

2024 Panel (in alphabetical order)

GI Group	Country
Consorzio italiano tutela Mortadella Bologna	Italy
Federación Nacional de Cafeteros de Colombia	Colombia
Federation of the Swiss Watch industry	Switzerland
Hangzhou Xihu Longjing Tea Co (杭州西湖龙井茶叶有限公司)	China
Idaho Potato Commission	USA
Instituto dos Vinhos do Douro e do Porto	Portugal
Interprofession du Gruyère	Switzerland
Irish Whiskey Association	Ireland
Kakao Berau (MPIG)	Indonesia
Kona Coffee Farmers Association	USA
Mornington Peninsula Vignerons Association	Australia
Napa Valley Vintners	USA
SA Rooibos Council	South Africa
Scotch Whisky Association	UK



Methodology

Every year, the survey contains **5 core questions on economic trends and expectations.**

In 2024, the trend topic concerns **legal costs and damages resulting from GI infringements.**

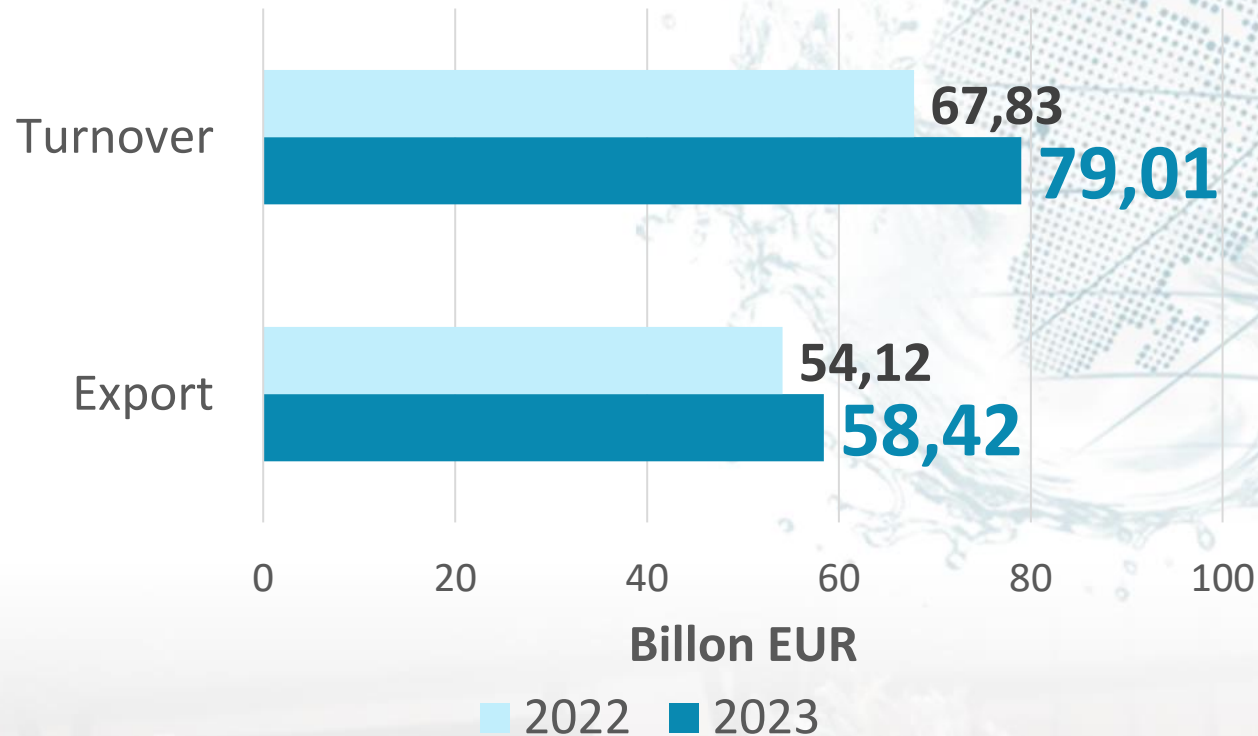
Answers reflect 2023 data as well as early 2024 sentiment.



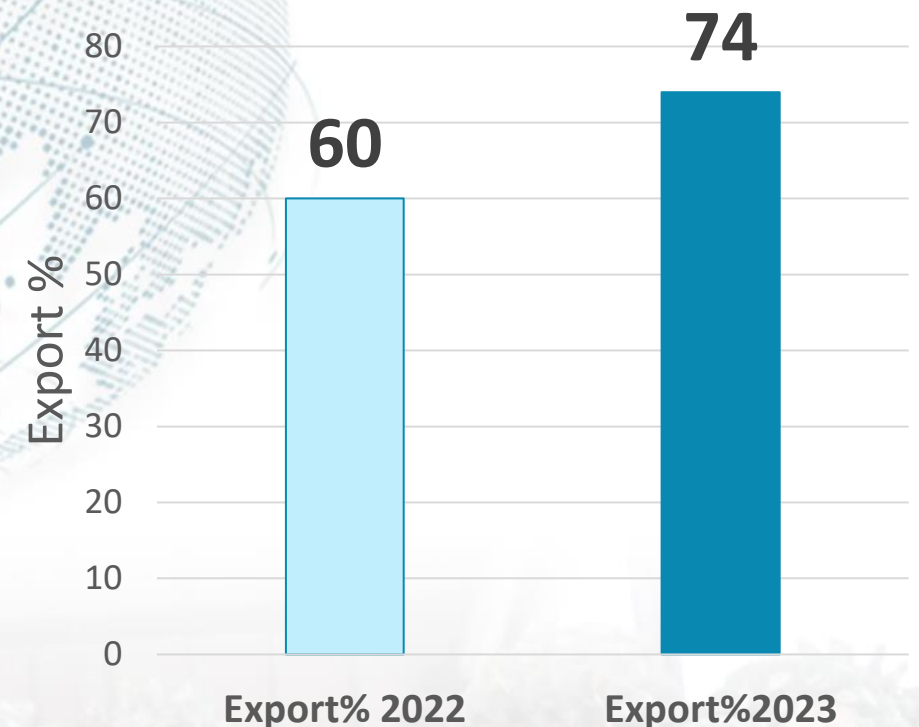
2024 Results

Aggregate turnover (at production level) & export (2023 data compared with 2022, in EUR)

Aggregate turnover and Export values



Export as % of the overall turnover



The overall geographical area (2023 data)

1.295.544 km² (area)

- The overall geographical area covered by the GIs in the 2024 Panel.
- In spite of difference in size among regions, they all serve as a catalyst for sustainable development:
 - ✓ Preservation of resources;
 - ✓ Employment opportunities;
 - ✓ Spill over effects on other sectors.



Direct jobs (2023 data)

495.032 job units (419.433 in 2022)

- GIs generate long-term jobs, which cannot be delocalized, preventing the depopulation of rural and craft areas.
- GIs align with several SDGs, including SDG 8 (Decent Work and Economic Growth) and 10 (Reduced Inequalities).





Trends affecting,
and sentiment of, GIs worldwide

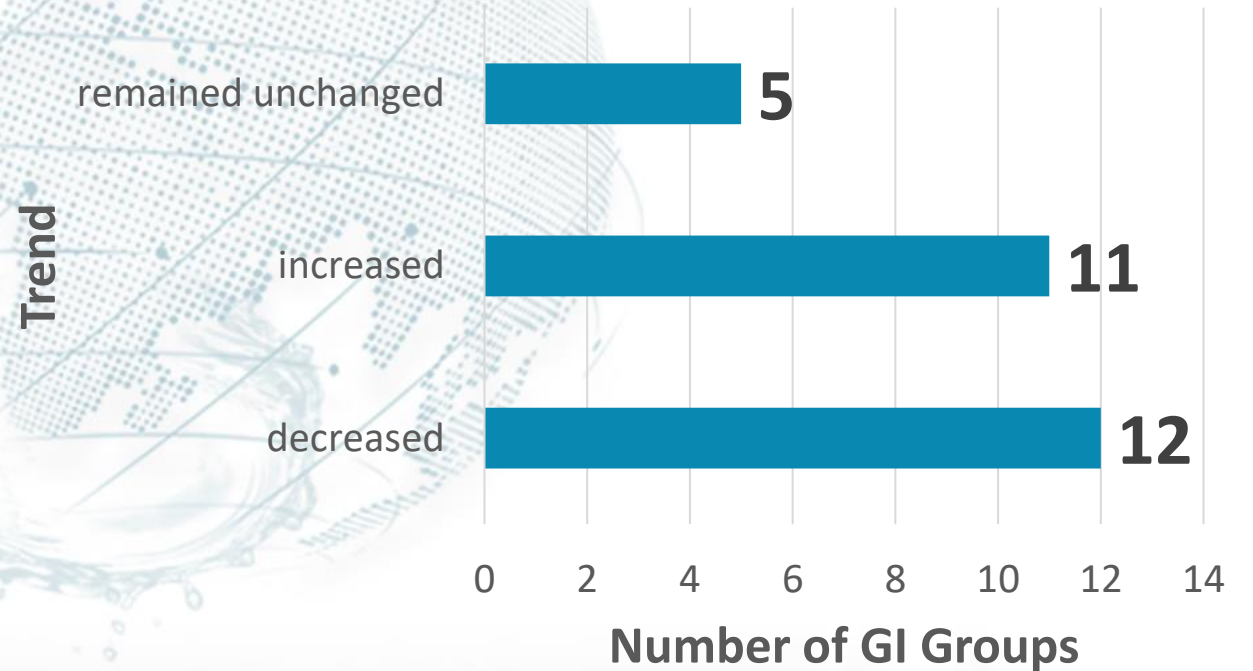
Question:

Compared to 2022, in 2023 the overall value of sales of the GI you represent have:

While the GI sector demonstrated resilience in 2023 (with a 60% of the panel maintaining stable or having increased sales), a 40% experienced a decrease from the previous year.

This might be related to the persistent effect of inflation on consumers behaviors.

2023 GI Sector Sales Performance

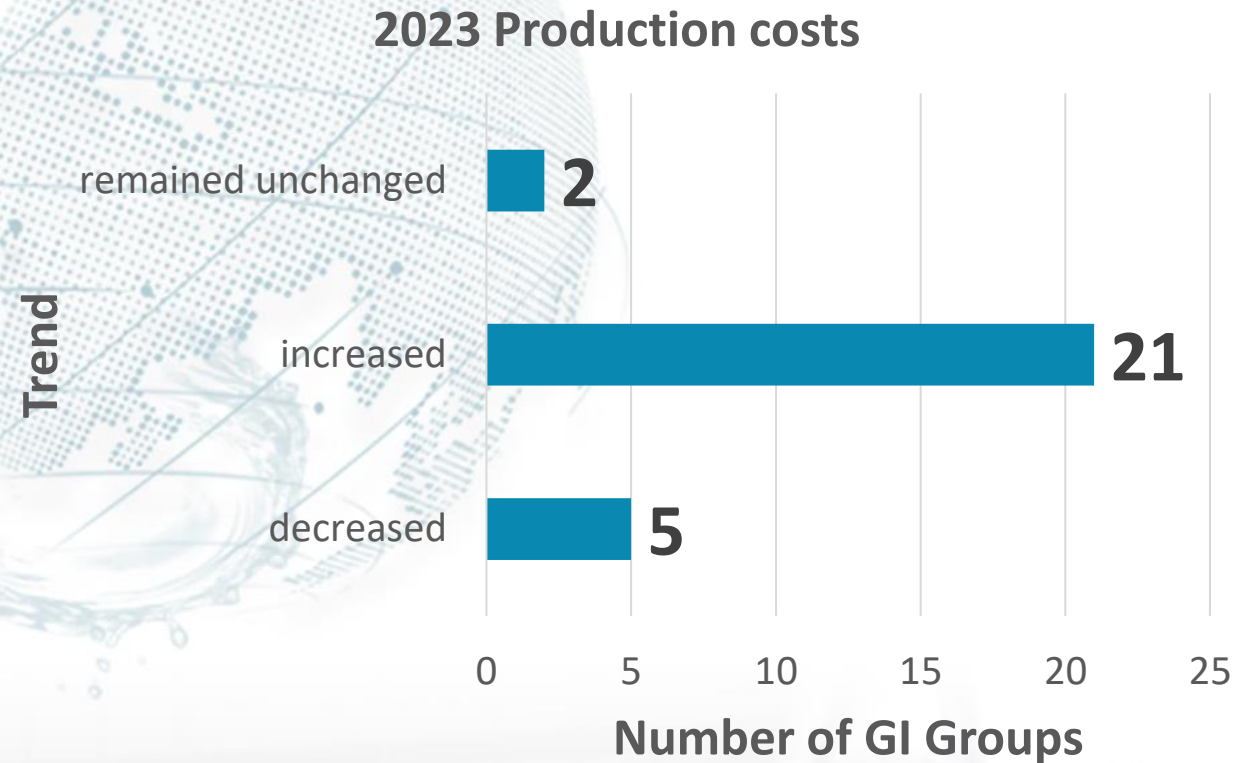


Question:

Compared to 2022, in 2023 the production costs within your GI value chain have:

Production costs have predominately increased in 2023 (confirming the persisting effect of inflation).

In this scenario, the fact the majority of interviewed GIs managed to maintain stable or increased sales shows the sector's ability to address challenges.

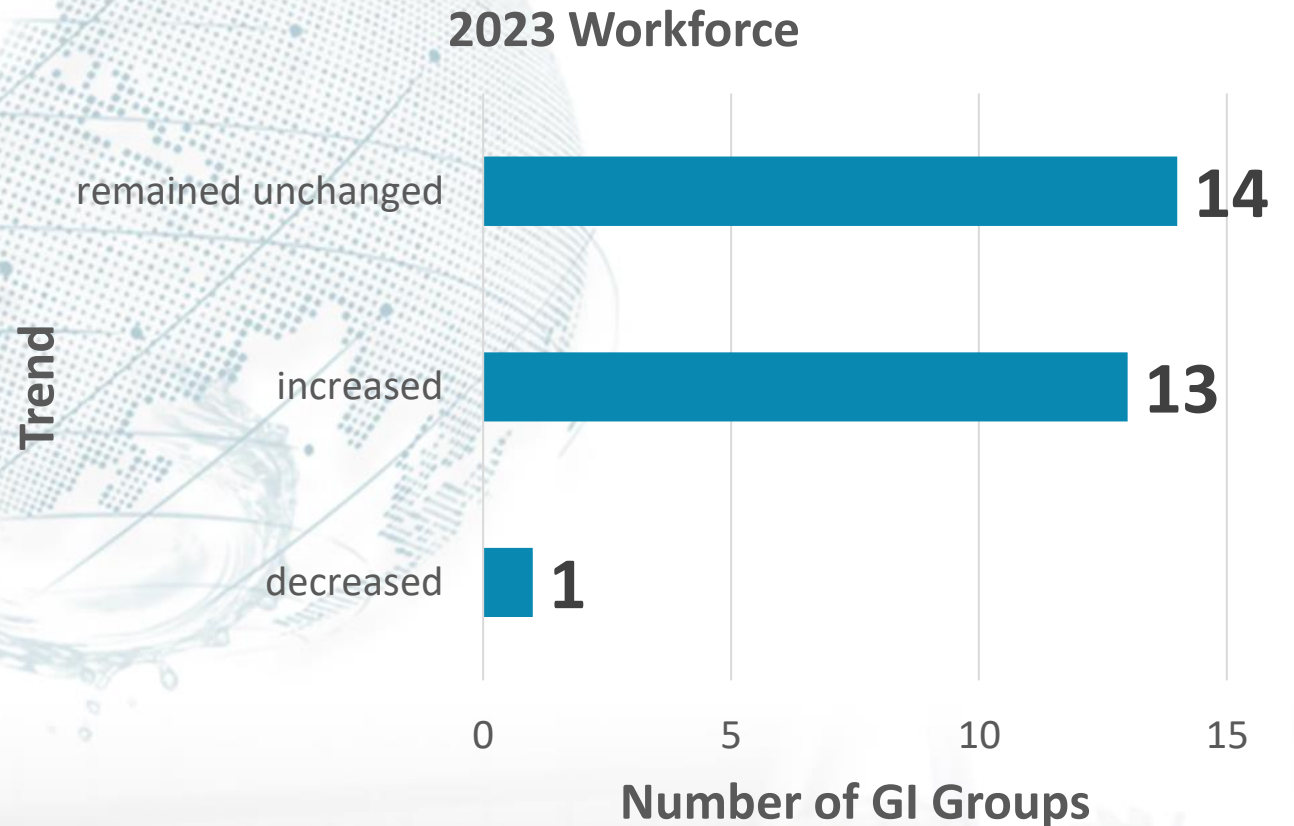


Question:

Compared to 2022, in 2023 the overall workforce within your GI value chain has:

In 2023, the interviewed GIs mainly maintained or expanded its workforce, despite the economic challenges (inflation, raising production costs, ...) .

This resilience confirms the GI sector long-term vision, its capacity to adapt to changing economic conditions and maintain employment levels.

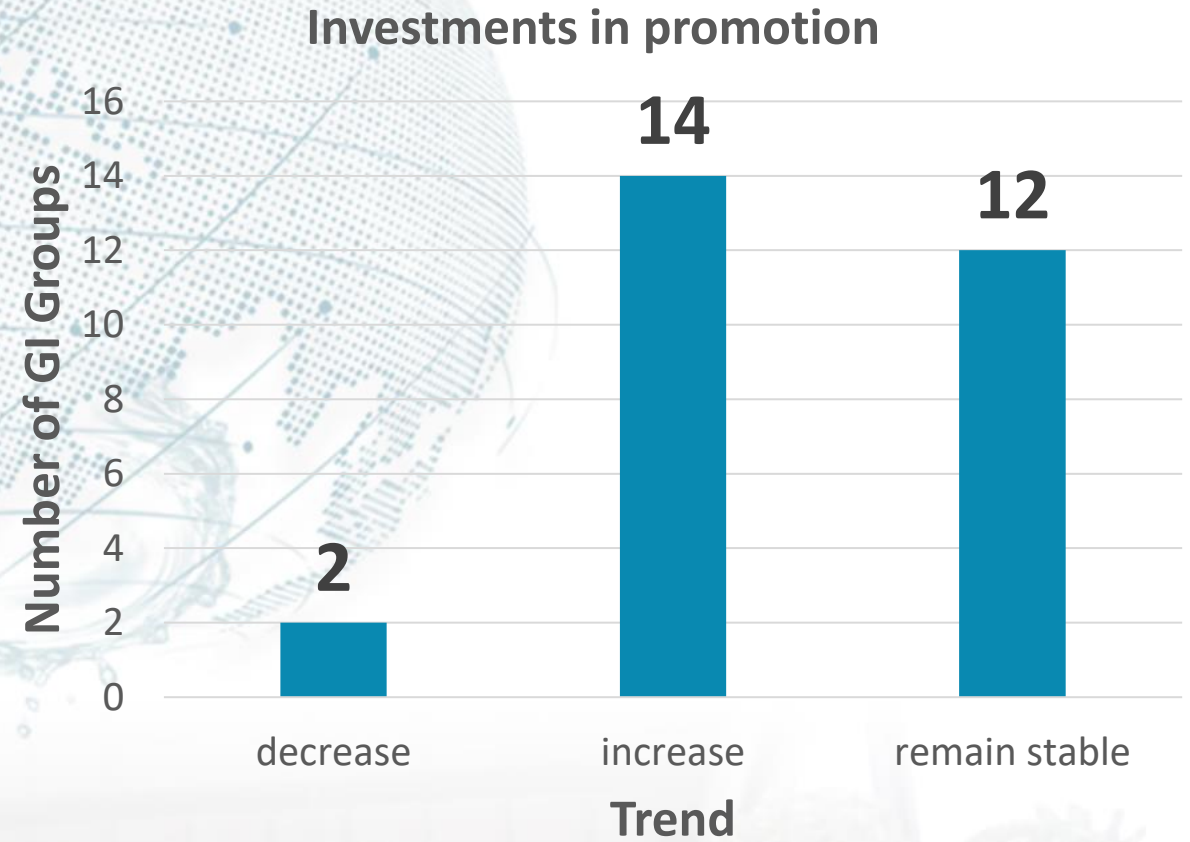


Question:

Compared to 2023, investments in promotion – by both the GI group and its members – in 2024 will:

Respondents' expectations for 2024 regarding investments in promotion within the GI sector are positive.

This signals confidence for the future as well as a proactive approach to promotion as a means to seize opportunities.

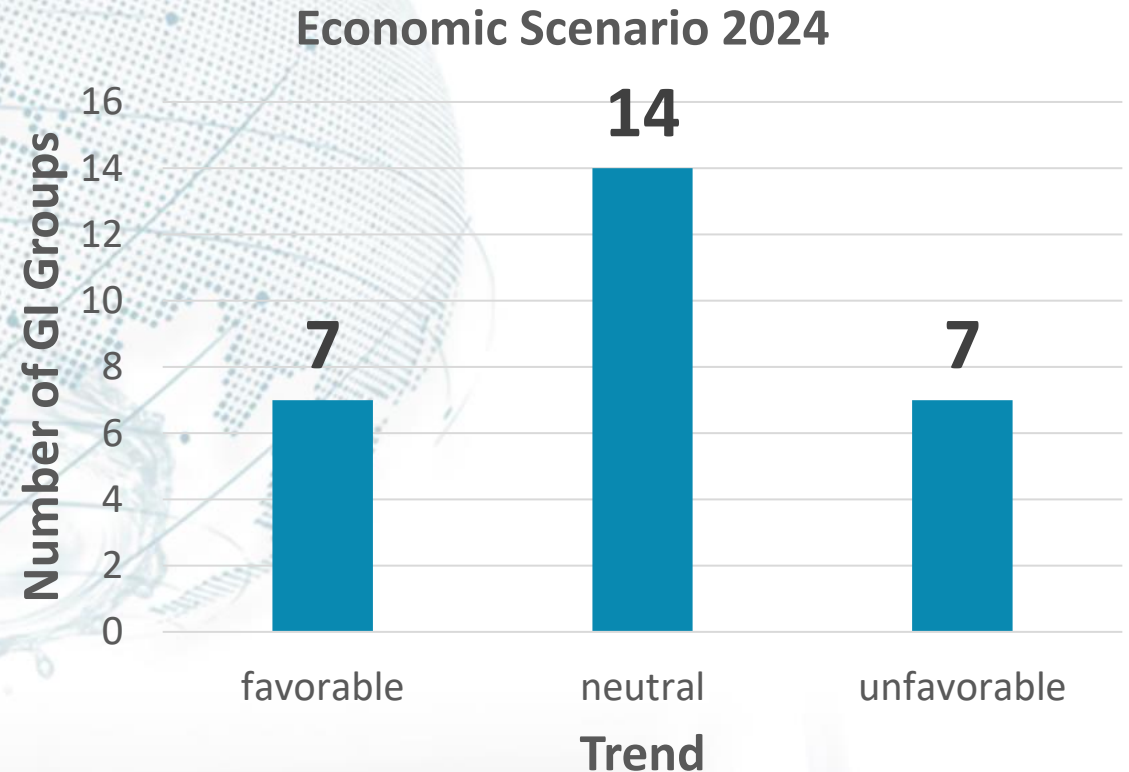


Question:

Compared to 2023, for the GI you represent the overall 2024 economic scenario looks :

While 2/3 of interviewed groups expects stability or a better scenario, 1/3 expresses concern.

This mixed sentiment, which suggests a situation of stalemate for the GI sector, is probably related to the persisting inflationary pressure as well as geopolitical uncertainty affecting export markets.





2024 Trend Topic: GI Groups Legal Costs and Actions

Question:

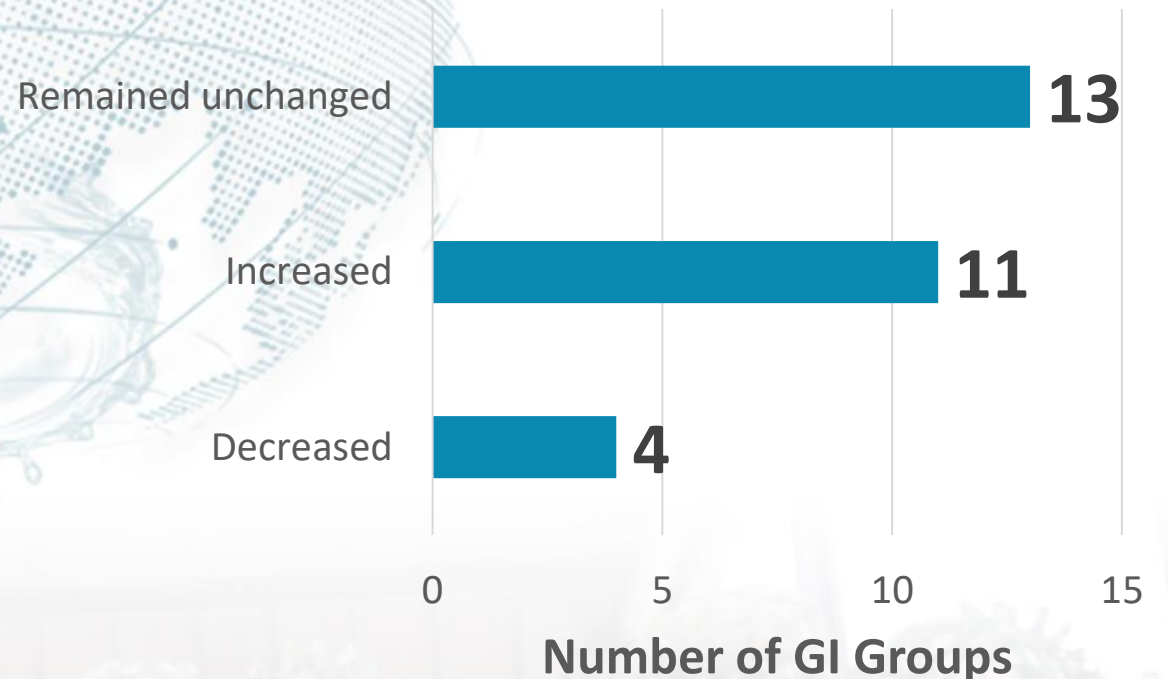
In 2023, compared to 2022, the legal costs of your group (intended as the expenses for monitoring and enforcing the GI it represents for in-house legal personnel as well as external law firms and agencies) have?

The overall trend indicates stable or increasing expenses.

Costs for protecting and enforcing GIs represent a financial burden for groups (several of them spend more than 1 million EUR per year).

Trend

Legal Costs



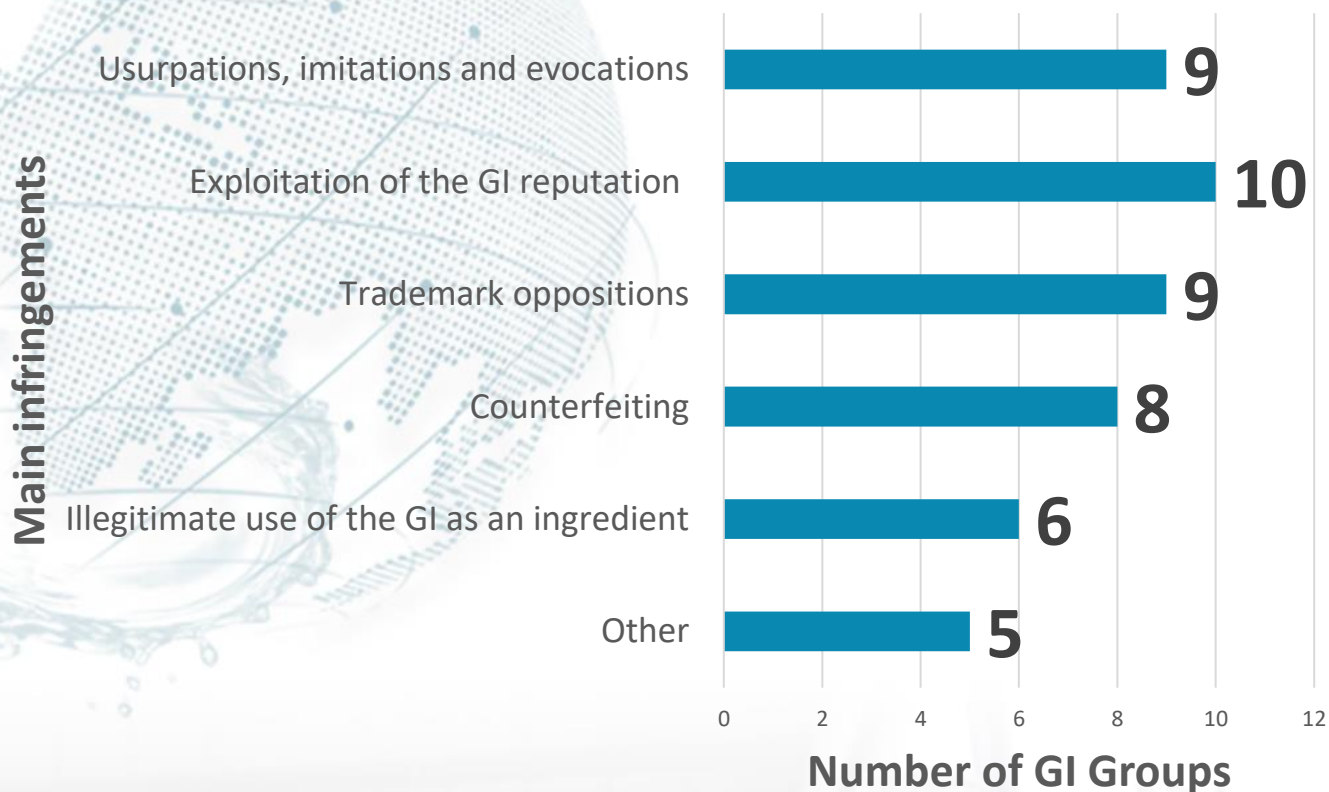
Question:

Which have been the 6 main categories of infringements having generated legal costs for your group in 2023?

“Reputation exploitation”, “usurpations”, “trademark oppositions” constitute the primary sources of legal expenses for the interviewed GI groups (with “Counterfeiting” and “Illegitimate use as ingredients” not far).

Under “Other”, website takedowns and UDRP proceedings were mentioned.

On top of “classic” infringements, more “subtle” ones (evocation, ingredients, ...) show a need for more robust legislation.

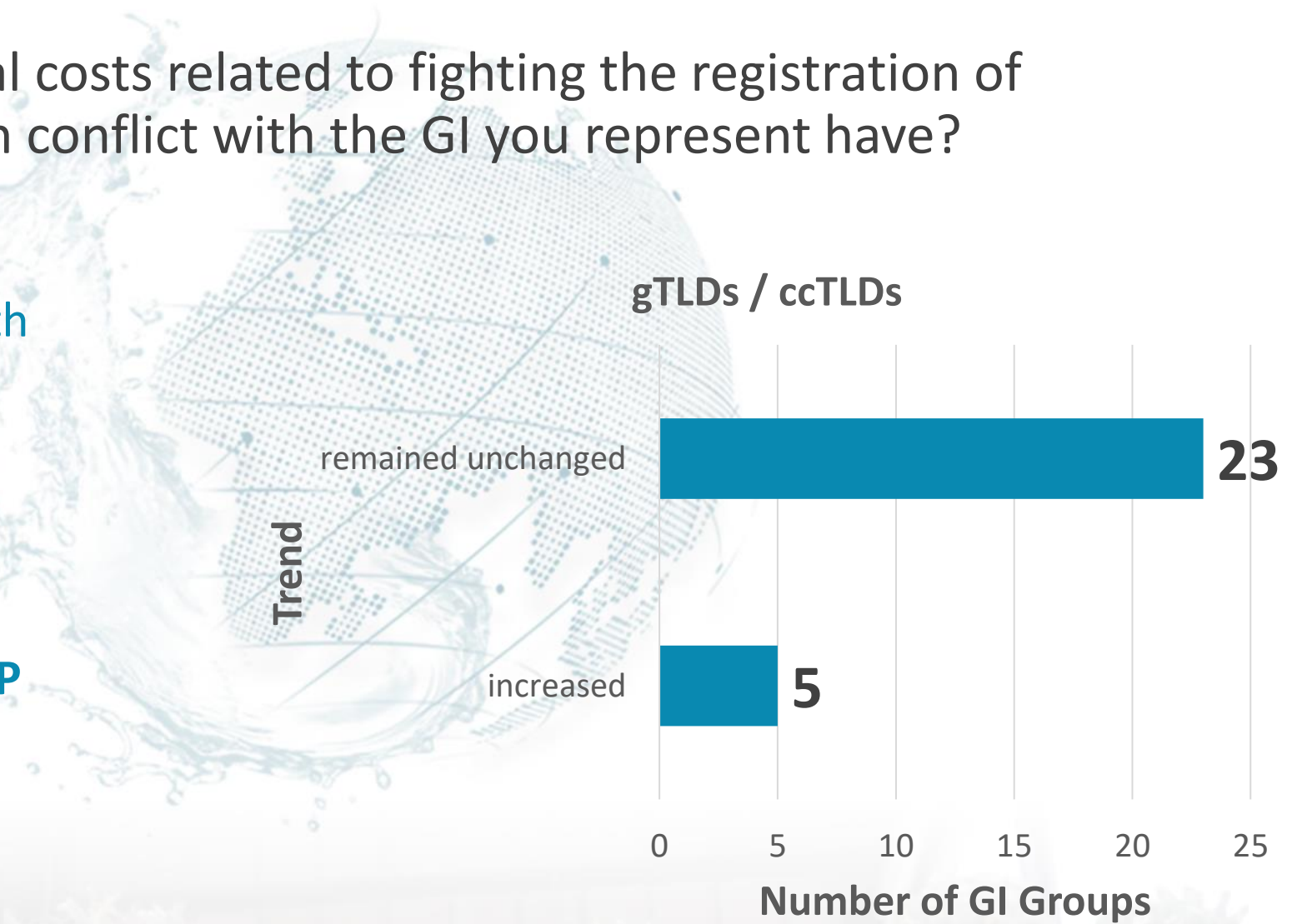


Question:

In 2023, your group’s legal costs related to fighting the registration of Internet domain names in conflict with the GI you represent have?

The legal costs associated with fighting the registration of internet domain names were mainly stable in 2023.

Following the new EU Regulations, the ICANN UDRP should be updated.

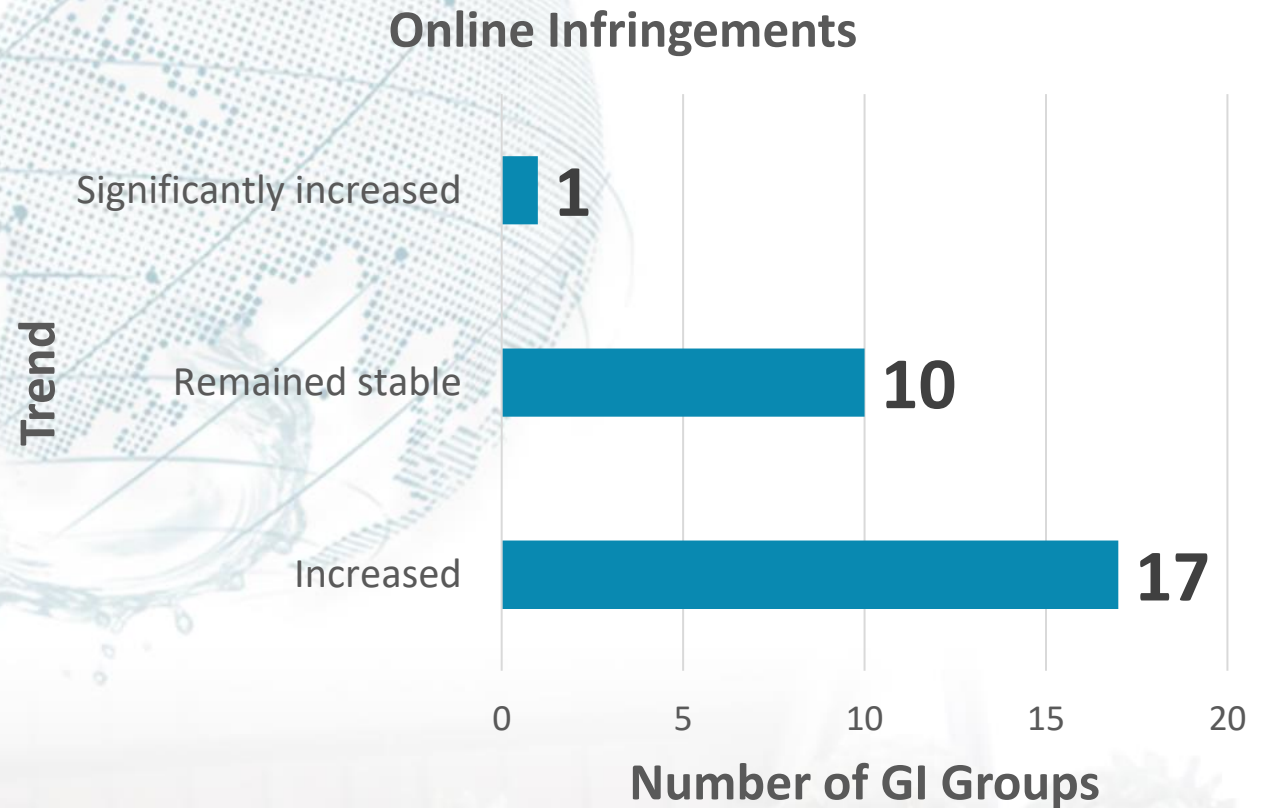


Question:

In 2023, the percentage of infringements having generated legal costs detected online (Internet Market Players and other websites) for your group has:

The legal costs for infringements detected online mainly increased in 2023.

This shows growing challenges for GI groups in the online environment.

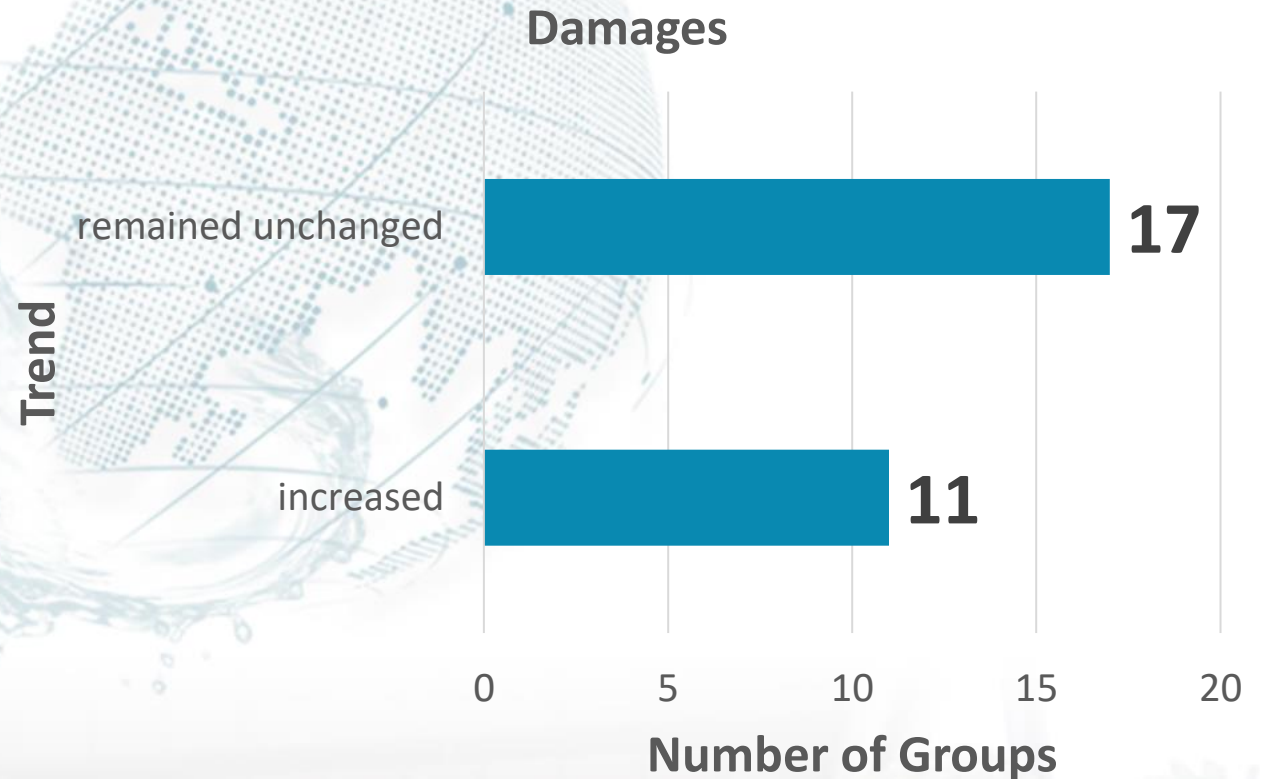


Question:

The damages to the GI you represent – generated by fake and other infringing items in the market – in 2023 have:

Damages mainly increased or remained unchanged in 2023.

This reinforces the call for more robust legislation on GI protection and enforcement.



Question:

How were the legal cases concluded in 2023 solved? (the most frequent):

In 2023, legal cases were primarily concluded through cease-and-desist letters and out-of-court settlements.

‘Ex officio’ enforcement (including TM offices) also showed effectiveness.

Under ‘Other’, customs seizure was mainly mentioned.

Those results show preference for fast and efficient resolution mechanisms.

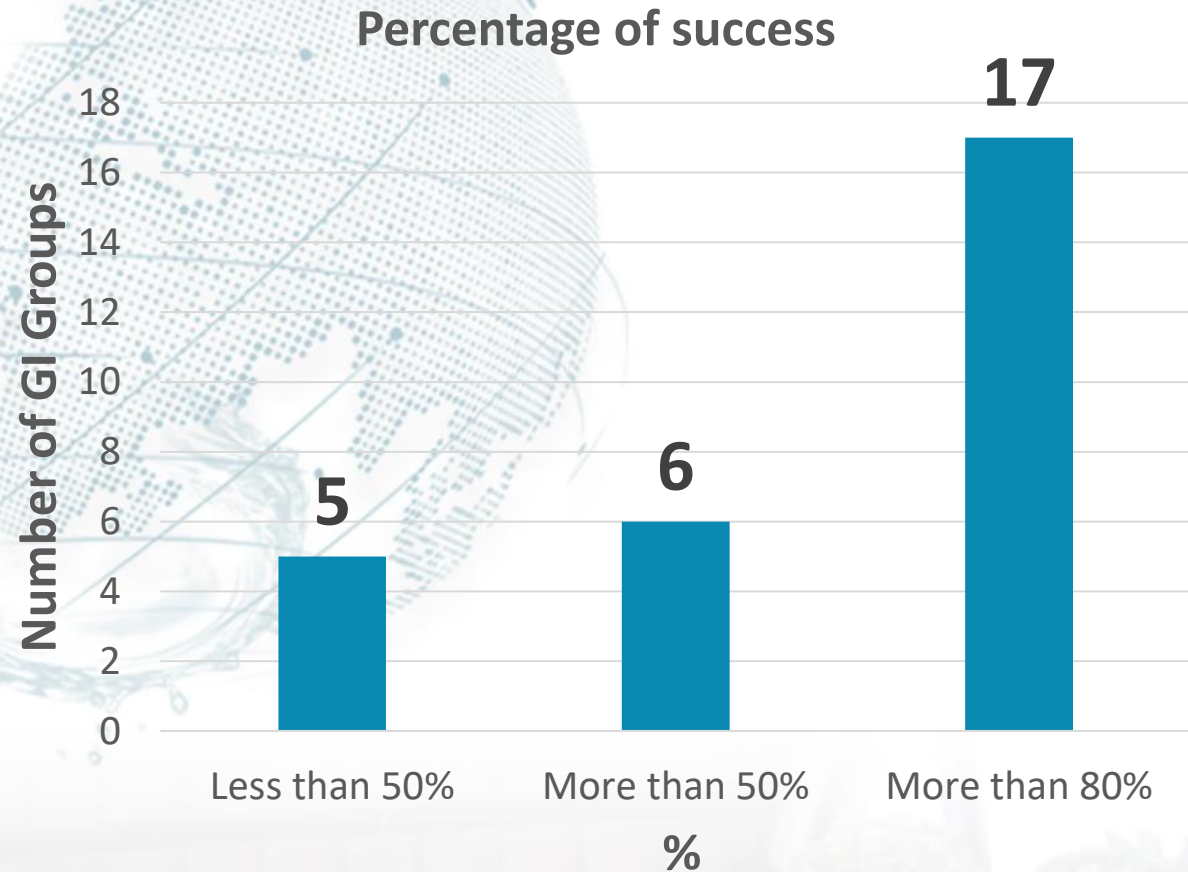


Question:

For the legal cases concerning the GI you represent concluded in 2023, the percentage of success is?

While a substantial number of interviewed GI groups reported success rates exceeding 80% and 50%, a few reported rates below 50%.

This might be related to “grey zones” in laws (use of GI as ingredients and UDRP), reinforcing the need for more robust legislation.



Question:

Given the legal costs faced by your group over the last 5 years, what kind of policy/ies you would like to see implemented at the national/regional/international level? (you can indicate up to 5 options) :



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**oriGIn policy & advocacy
agenda**

Desired policies ranking:

1. More effective public authorities' enforcement
2. Improvement of the international legal framework for the protection of GIs online
3. Stronger coordination with your national authorities with respect to the negotiation and ratification of bilateral agreements covering GIs/Swifter and more cost-effective judicial decisions
4. Specialists IP courts
5. Stronger coordination and best practice sharing with other GI groups
6. Judicial awards of meaningful damages for illegal profits
7. Public financial support to cover legal expenses
8. Ratification by your national authorities of the WIPO Geneva Act of the Lisbon Agreement



Conclusions



Some conclusions

- I. The 2024 "GI Trends" Panel consists of **28 GI groups** representing a combined turnover of **79.01 billion EUR**, **58.42 billion EUR** of export (74%), half a million direct jobs and some **1.295.544 km²** of land.
- II. These figures reaffirm the socio-economic impact of GIs on a global scale and offers a glimpse into the worldwide impact of the **more than 10,000 GIs** recognized worldwide.
- III. In a context of evolution of “societal” values, consumers’ perception and trade regulations are pushing all economic sectors to rethink their business model, **GIs represent a model for a more inclusive sustainable development paradigm.**

Some conclusions


- IV. Overall, the GI sector demonstrated **resilience** in 2023, with the majority of interviewed GIs maintaining stable or increasing sales and workforce.
- V. This confirms the sector's ability to adapt to changing economic conditions and address challenges through a **long-term vision**.
- IV. On the other hand, especially **in terms of perception for 2024** , a few signs **of stalemate emerge**, probably related to the persisting **inflationary pressure** as well as **geopolitical uncertainty** affecting export markets.

Some conclusions

- VII. Costs for protecting and enforcing GIs represent a financial burden for groups (several of them spend more than 1 million EUR per year).
- VIII. Need of **financial support** by public authorities (as well as to conclude / accede to bilateral agreements / Geneva Act) to allow **small groups to protect and enforce the GIs they represent.**
- IX. There is a clear **need for more robust legislation** with respect to “grey zones” (use of GI as ingredients and UDRP), to tackle more “subtle” infringements, such evocation, and on ex officio enforcement.
- X. GI groups need **fast and efficient resolution mechanisms.**
- XI. The **oriGIn Policy & Advocacy Agenda** is aligned with the needs of its members.
- VII. **Crucial role of oriGIn** in the exchange of competencies and best-practices.



Towards the 2025 Survey



The upcoming 2025 survey is scheduled to take place during the first quarter of the year and will be presented by June.

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.

More information: www.origin-gi.com - info@origin-gi.com

The logo for oriGIn features the word "oriGIn" in a bold, black, sans-serif font. The letter "G" is highlighted with a green square background.

Organization for an International
Geographical Indications Network