

oriGIn Survey 'GI Trends' 2026

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

32 GI Groups · 20 Countries · 5 Continents



The oriGIn 'GI Trends' Survey

Since 2022

oriGIn monitors once a year the major trends affecting, and the sentiment of, GIs worldwide through a survey sent to selected GI associations.

Global representativeness

Associations are selected to ensure a wide spectrum of turnover and export figures as well as global representation. The panel composition slightly changes annually.

Objective

Strengthen the common identity of GIs worldwide and support the voice of GIs in advocacy campaigns vis-à-vis policymakers.

Methodology

5 Core questions

Economic trends and expectations: sales performance, production costs, workforce, promotion investments, economic outlook. Responses reflect 2025 data and economic sentiment in early 2026.

5-10 Trend topic questions

Formulated each year around a specific theme.

2026 Trend Topic: GI Groups

An overview of GI groups — governance, activities, funding, priorities and challenges — to better understand how they operate and support their members as well as offer patterns to GIs not having them.

2026 Survey Overview

32
GI Groups
Agricultural, wines, spirits and crafts

20
Countries
Across 5 continents

5
Continents
Global geographic representation

The 2026 Survey includes a panel of 32 associations of different economic sizes and sectors from 20 countries across 5 continents. Together with GIs among the most relevant worldwide in terms of turnover and export, it also surveys small GIs crucial for the socio-economic life of their communities — reflecting the variety of the estimated 20,000+ recognised GIs internationally.

2026 Panel — GI Groups (1-16)

GI Group (in alphabetical order by country)	Country
Cerrado Mineiro Coffee Growers Federation	Brazil
Hangzhou West Lake Longjing Tea Co., Ltd	China
Federación Nacional de Cafeteros de Colombia (FNC)	Colombia
Corporación Habanos S.A.	Cuba
Bureau National Interprofessionel du Cognac	France
Comité Champagne	France
Comité Interprofessionel de Gestion du Comté	France
Syndicat du Pruneau d'Agen	France
Bayerischer Brauerbund e.V.	Germany
Council of Tokaj Wine Communities	Hungary
Irish Whiskey Association	Ireland
Consorzio Aceto Balsamico di Modena	Italy
Consorzio Prosecco DOC	Italy
Consorzio Vino Nobile di Montepulciano	Italy
Consorzio del Prosciutto di Parma	Italy
Consorzio del formaggio Parmigiano Reggiano	Italy

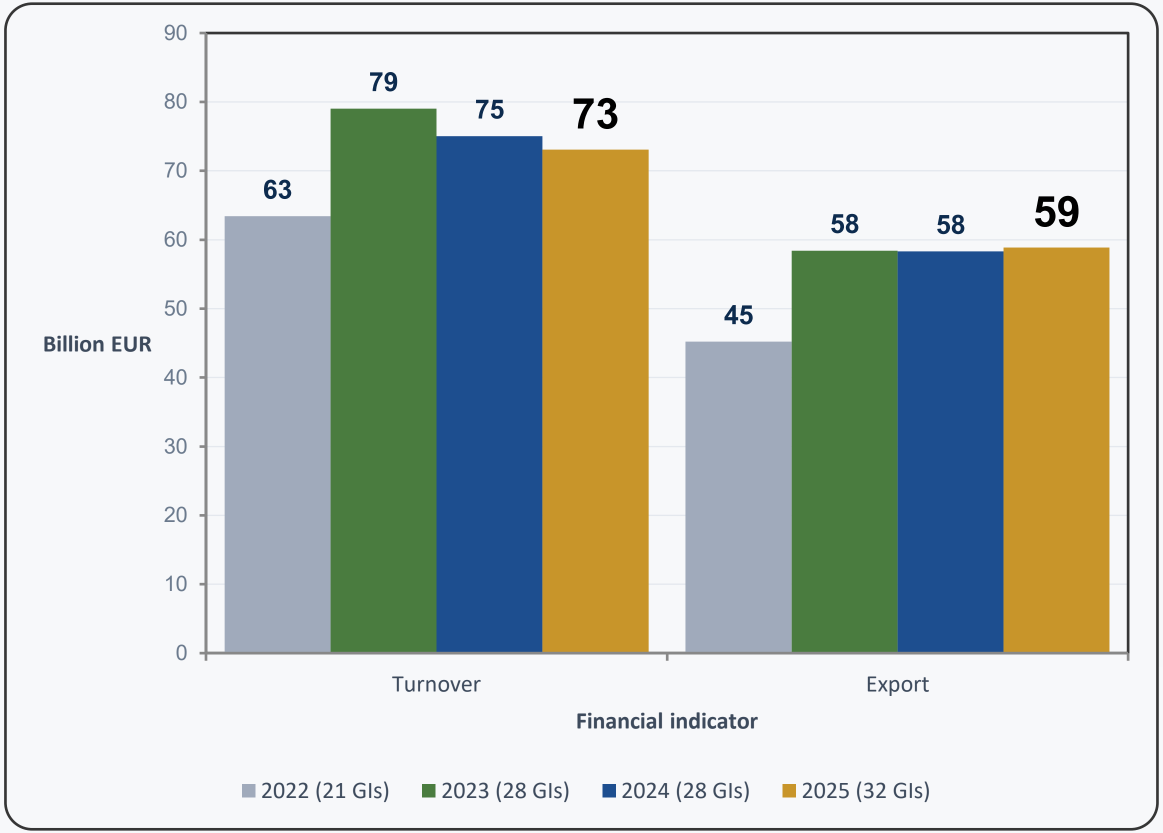
2026 Panel — GI Groups (17-32)

GI Group (in alphabetical order by country)	Country
Consorzio di tutela formaggio Grana Padano	Italy
Consorzio italiano tutela Mortadella Bologna	Italy
Consorzio per la Tutela del Franciacorta	Italy
Consejo Regulador del Tequila A.C.	Mexico
Consejo Regulador DO Café Villa Rica	Peru
Instituto dos Vinhos do Douro e do Porto (IVDP)	Portugal
SA Rooibos Council	South Africa
Consejo Regulador Jijona y Turrón de Alicante	Spain
Fundación Consejo Regulador Queso Manchego	Spain
Federation of the Swiss Watch Industry FH	Switzerland
Interprofession du Gruyère	Switzerland
Harris Tweed Authority	UK
Scotch Whisky Association	UK
Idaho Potato Commission	USA
Kona Coffee Farmers Association	USA
Napa Valley Vintners	USA

2026 Results

Aggregate Turnover & Export (Billion EUR)

2025 data compared with 2024, 2023 and 2022



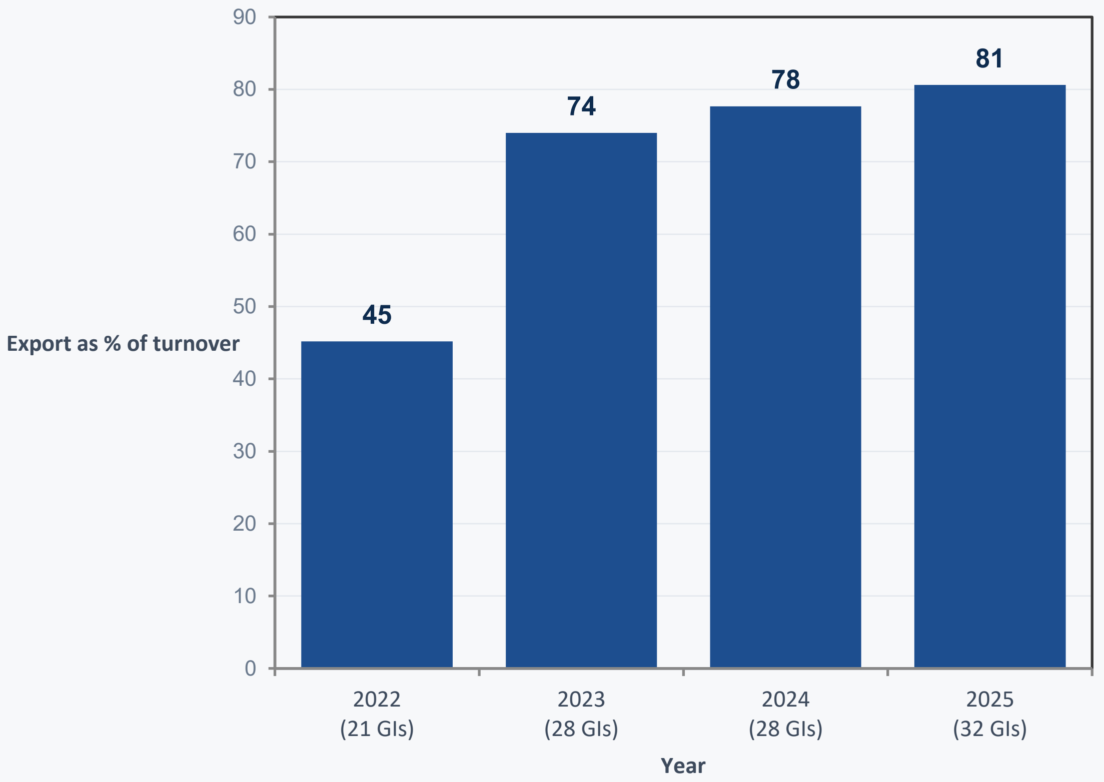
Turnover reached €73.1B in 2025, slightly below 2024 due to rising production costs, demand contraction and geopolitical uncertainty. Yet it remains historically strong.

Export values held steady at €58.9B, reflecting resilient global demand for GI products.

Billion EUR

Export as % of Overall Turnover

Trend 2022–2025

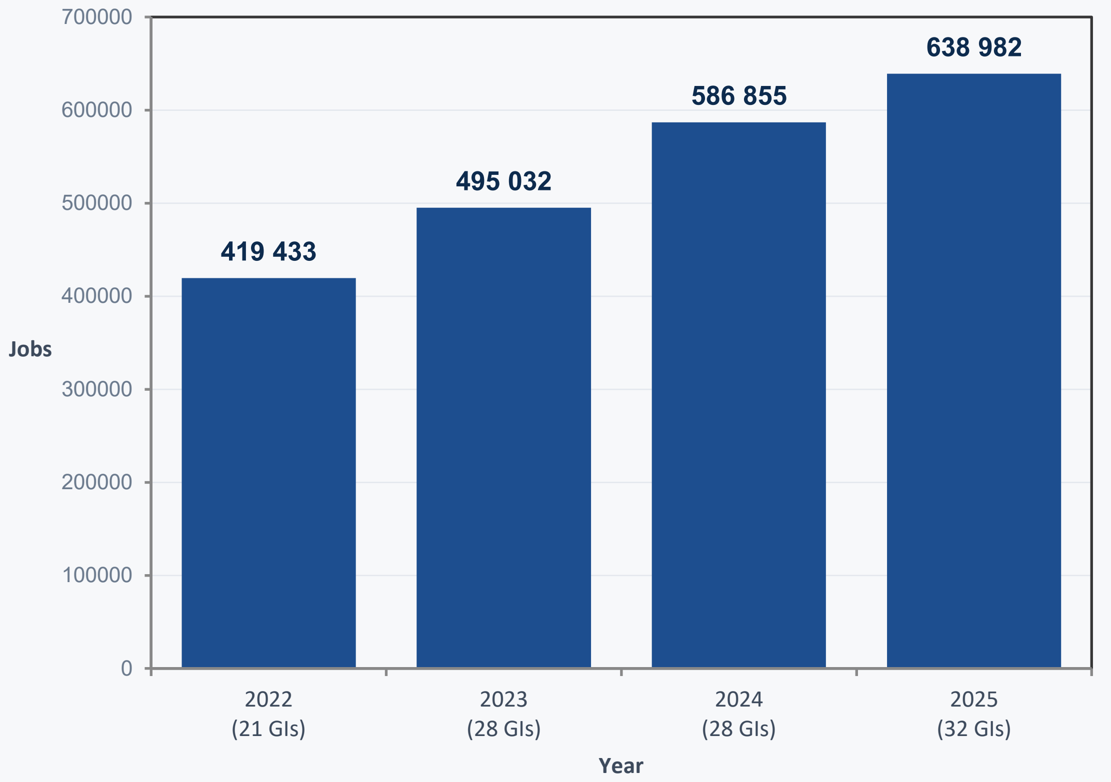


Export intensity reached 80.6% in 2025, continuing its upward trend since 2023 — 8 out of every 10 euros of GI production is exported.

This confirms GIs as a sector with resilient international demand, even under costs' pressure and geopolitical uncertainty.

Direct Jobs

2025 data compared with prior years



Direct employment reached 638,982 jobs in 2025.

This steady job creation, despite rising costs and demand contraction, reflects the sector's resilience and its socio-economic value and long-term vision.

Overall geographical area covered by the 2026 Panel.

An area larger than France and Spain combined.

1,057,214 km^2

Annual visitors to GI facilities (indicative average, 18 respondents)

Comparable to the total annual tourists of Greece or Austria, confirming GI-linked tourism as a growing economic force where product identity, territory and culture converge to boost local economies.

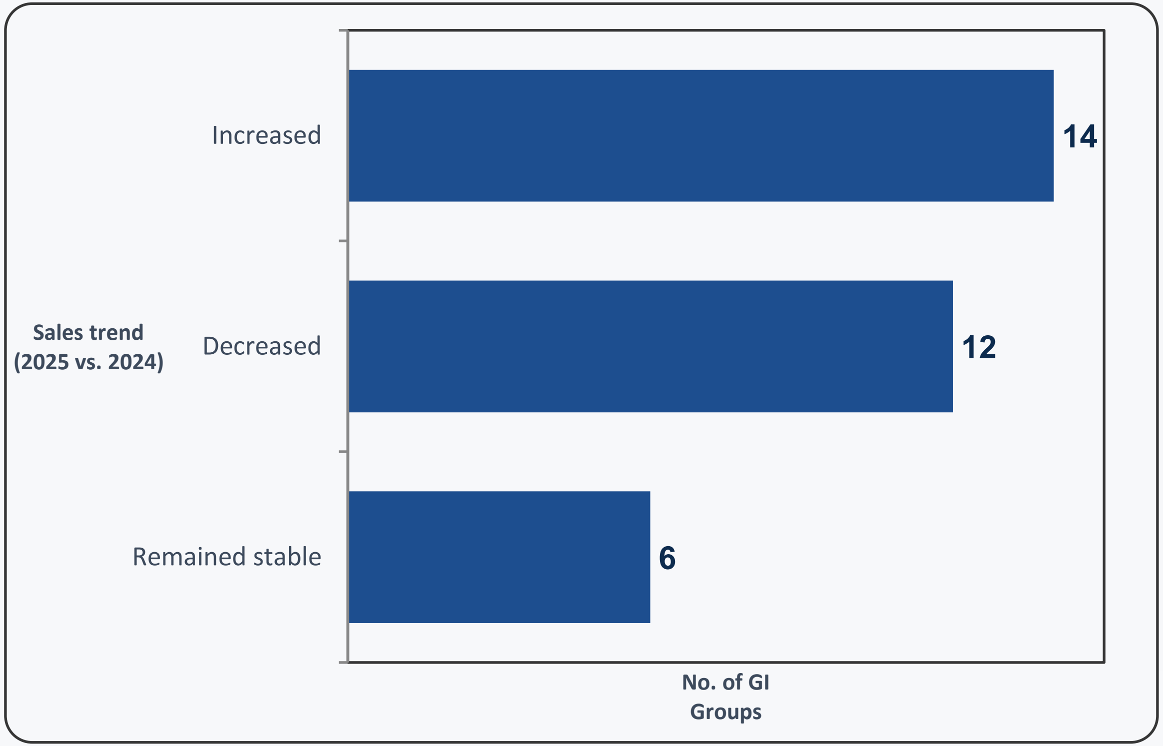
13,821,200

Annual visitors

Trends affecting, and sentiment of, GIs worldwide

2025 GI Sector Sales Performance

Question: Compared to 2024, in 2025 the overall sale value of the GI you represent has:

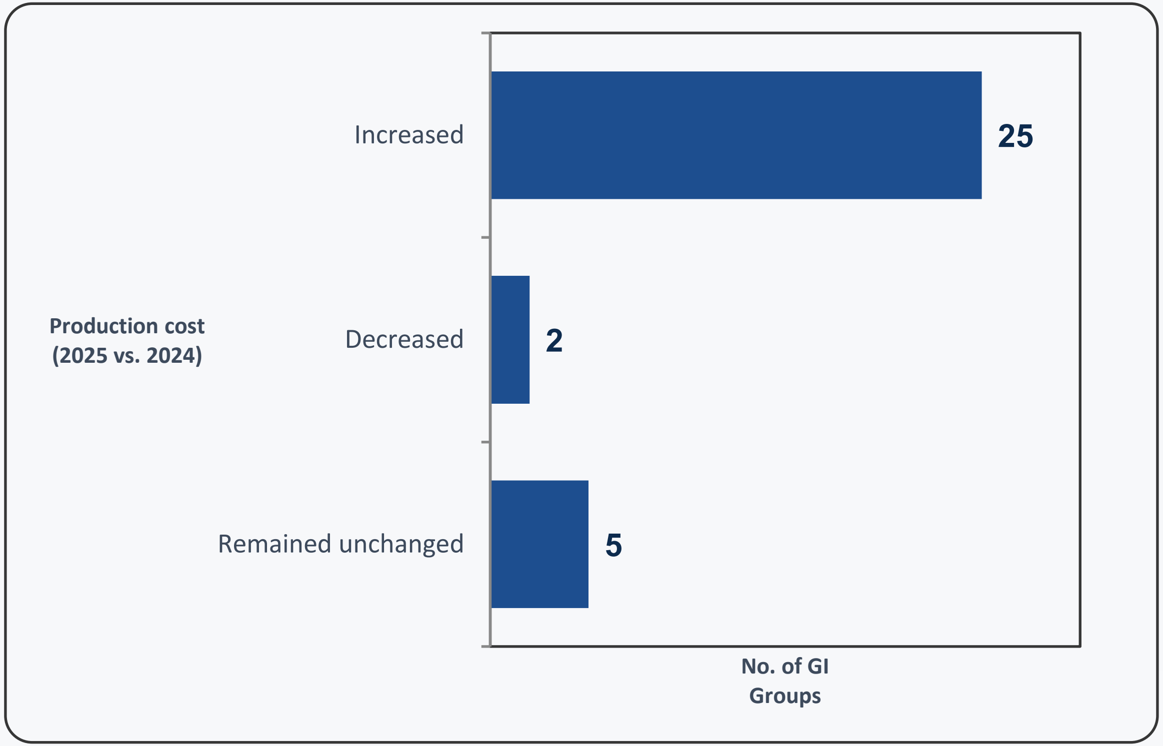


Despite a challenging environment, 42% of GIs managed to grow sales in 2025, a sign of resilience.

Yet 39% declined, reflecting the combination of trade tensions, tariffs and geopolitical uncertainty.

2025 Production Costs

Question: Compared to 2024, in 2025 the production costs within your GI value chain have:

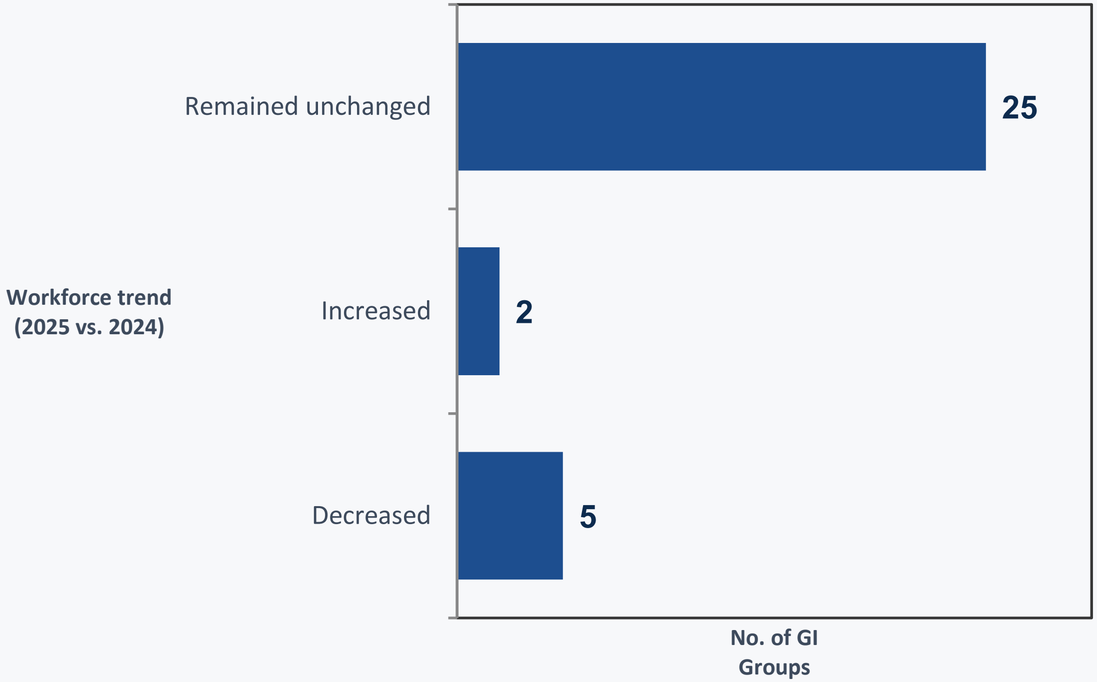


Production costs rose for 77% of GIs in 2025, with only 6% seeing a decrease.

Inflation and supply chain disruption continue to squeeze margins, making cost management one of the sector's most pressing challenges.

2025 Workforce Trends

Question: Compared to 2024, in 2025 the overall workforce within your GI value chain has:

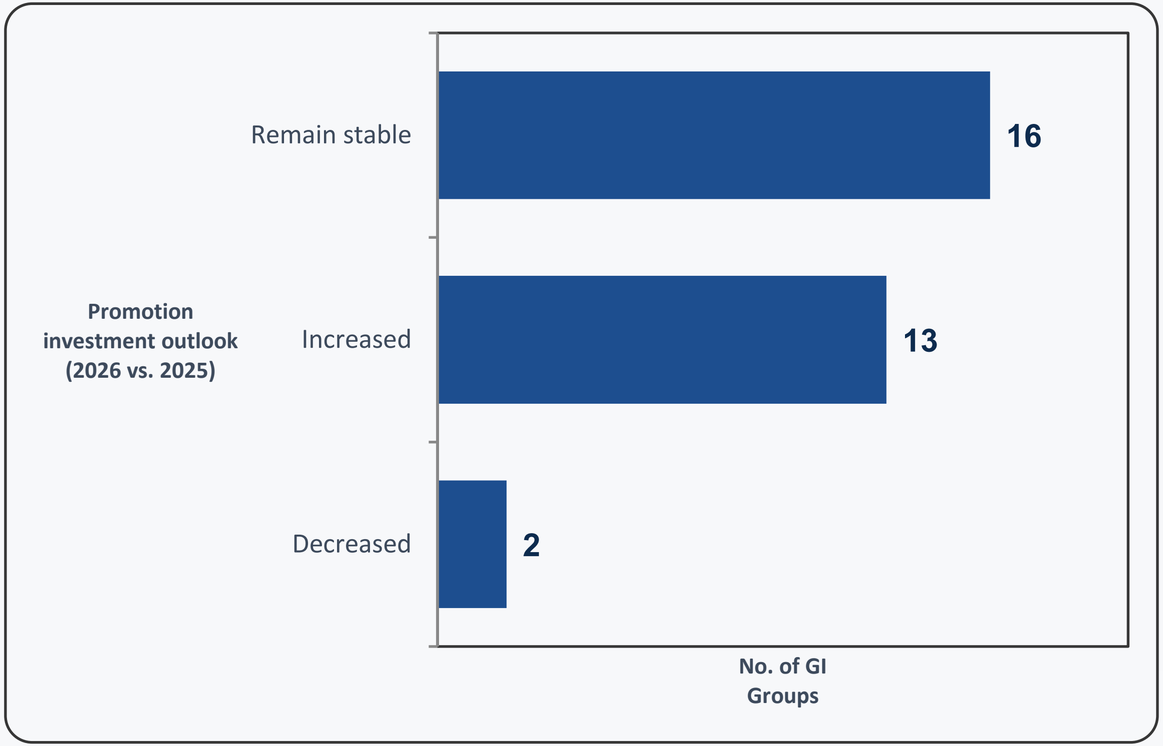


78% of GIs maintained their workforce in 2025 despite rising production costs, with only 16% reducing headcount.

Employment levels held remarkably stable, reflecting the sector's structural resilience.

Investments in Promotion — 2026 Outlook

Question: Compared to 2025, investments in promotion in 2026 are expected to:

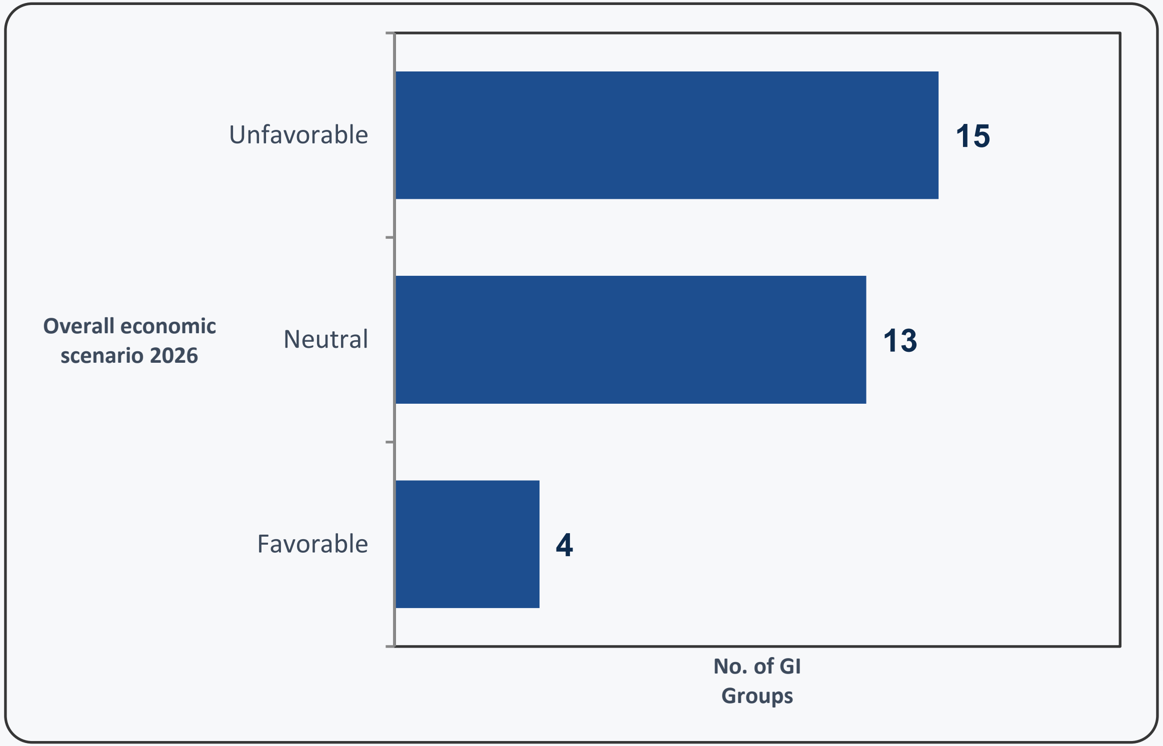


94% of GIs plan to maintain or increase promotional budgets in 2026, a near-unanimous commitment that signals long-term confidence in the sector.

Even under economic pressure, “brand” visibility and market presence remain strategic priorities for GI groups.

Overall Economic Scenario 2026

Question: From the point of view of the GI you represent, the overall 2026 economic scenario looks:



The 2026 outlook is predominantly cautious: 48% of GIs foresee unfavorable conditions, more pessimistic than a year ago. Only 10% are optimistic, with 42% expecting a neutral environment at best.

Tariff risks, geopolitical instability and rising production costs are the main reasons of concern.

2026 Trend Topic: GI Groups

Governance · Activities · Priorities · Challenges

'GI Groups' as the 2026 Trend Topic

Groups are the backbone of the GI system worldwide, yet their governance and resources remain largely undocumented.

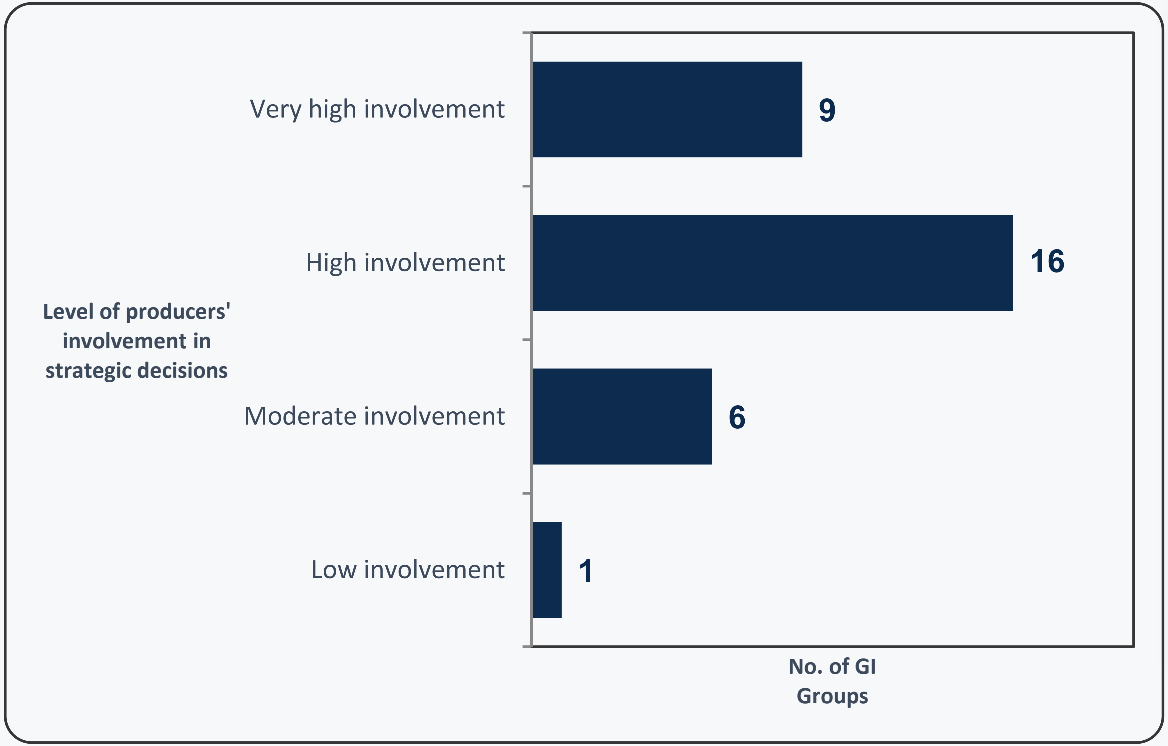
Understanding how GI groups operate and are funded is key to assessing the long-term sustainability of the GI model.

The 2026 topic explores: governance structures, main activities, funding sources, strategic priorities and key challenges.

Insights will drive advocacy and capacity building to support the creation and consolidation of groups for activities at national and international level.

Members' Involvement in Strategic Decision-Making

Question: How would you describe members' involvement in the strategic decision-making of your GI group?

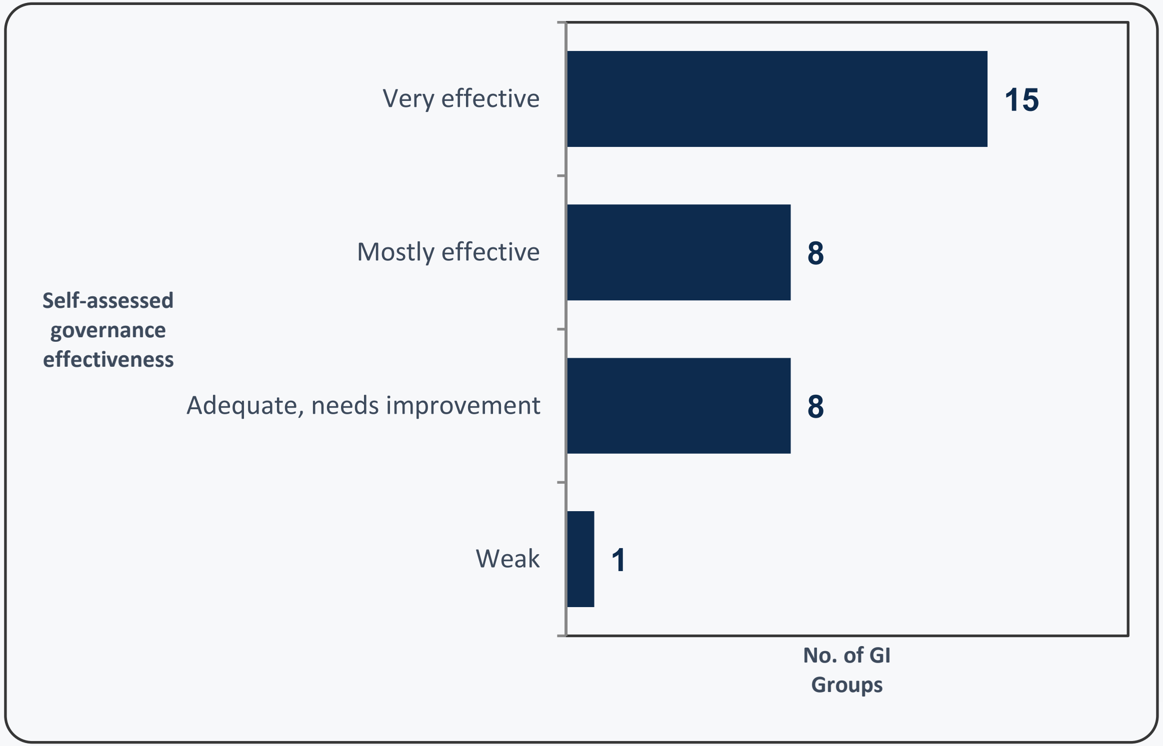


77% of GI groups report high or very high members' involvement in strategic decision-making — with only 1 reporting low involvement.

This reflects the collective, bottom-up governance model at the heart of GI system, where stakeholders actively shape their organisation's direction.

Self-Assessed Overall Governance Effectiveness

Question: How would you assess the overall effectiveness of your GI group's governance structure?



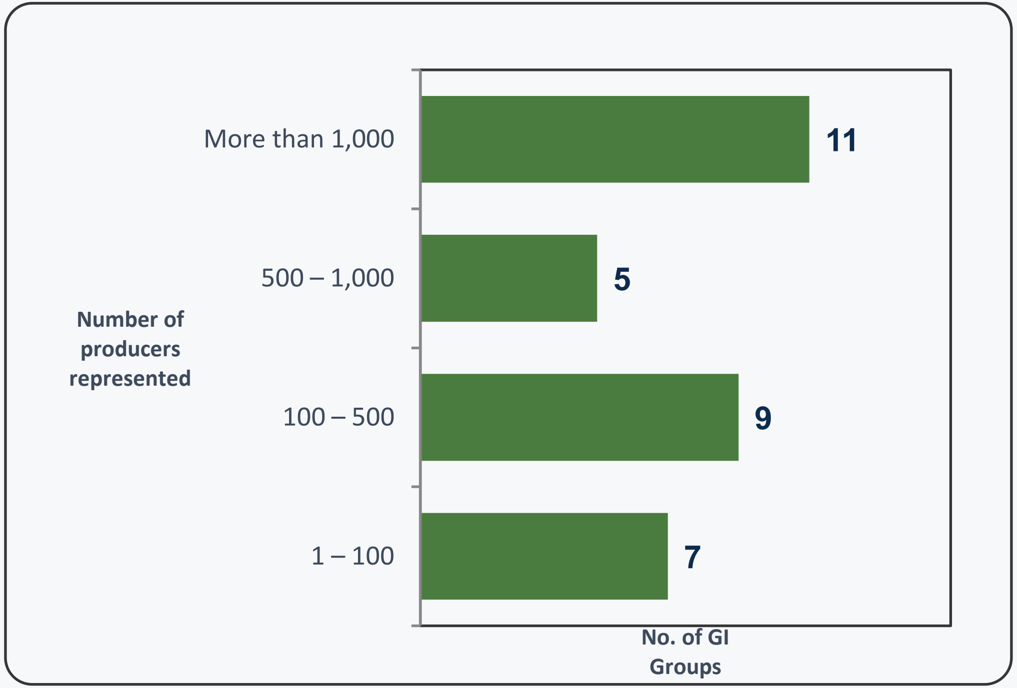
71% of GI groups rate their governance as effective or very effective, reflecting strong institutional consolidation.

The 26% acknowledging room for improvement signals that effective governance remains a priority, particularly for smaller or newer associations.

Representativeness of GI Groups

Questions: How many producers does your group represent? What % of total producers are members?

Number of producers represented



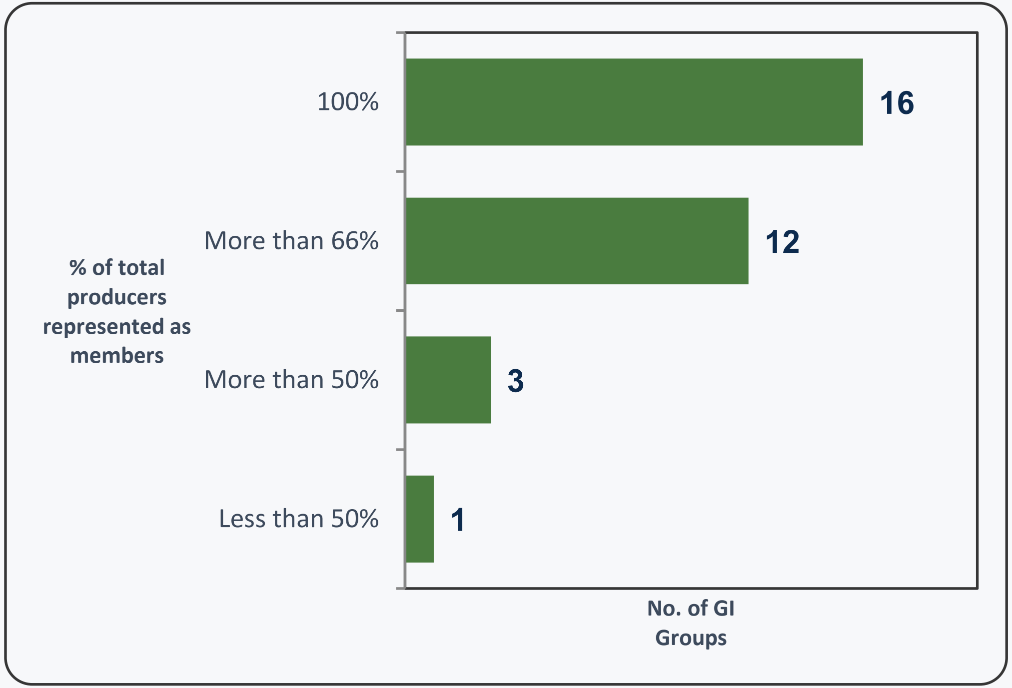
32% of GI groups represent more than 1,000 stakeholders, while the majority operate at a smaller scale.

This diversity reflects the wide range of GI structures worldwide.

Representativeness of GI Groups

Questions: How many producers does your group represent? What % of total producers are members?

% of total producers represented

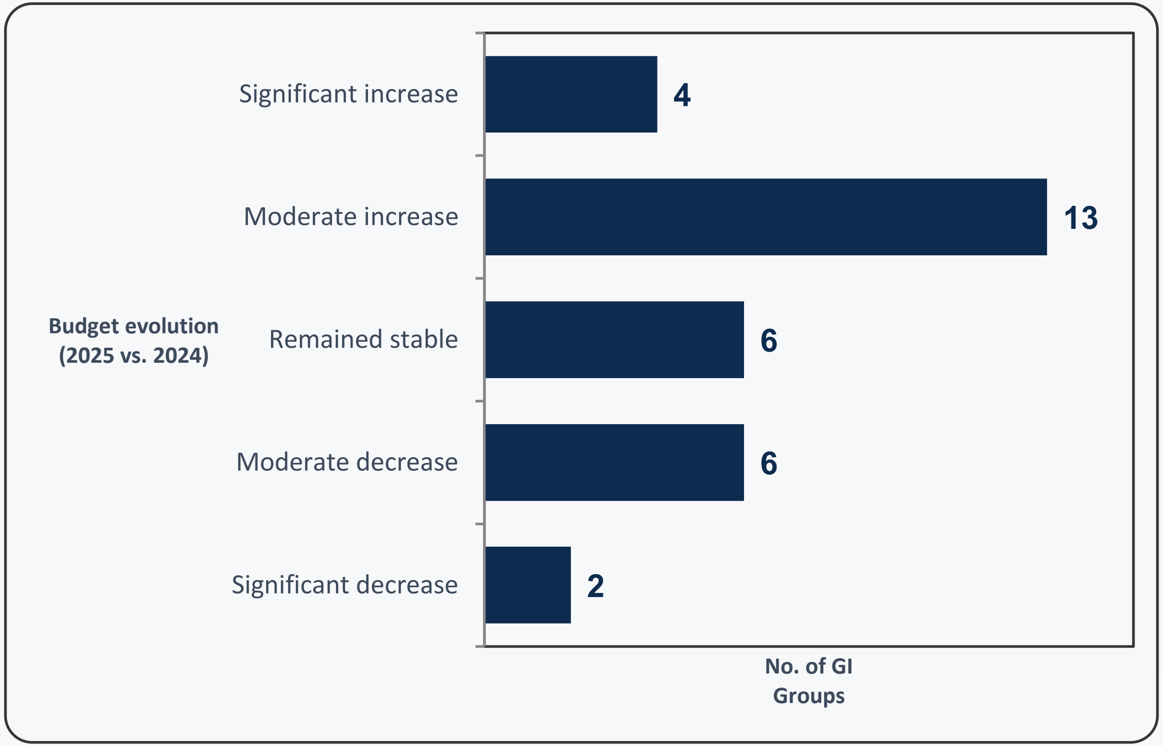


48% of GI groups represent 100% of GI stakeholders, confirming strong institutional legitimacy and broad membership coverage.

Where representation is partial, it often reflects fragmented production structures or weak governance.

Overall Budget Evolution of GI Groups

Question: How has the overall budget of your GI group evolved in 2025 compared to 2024?

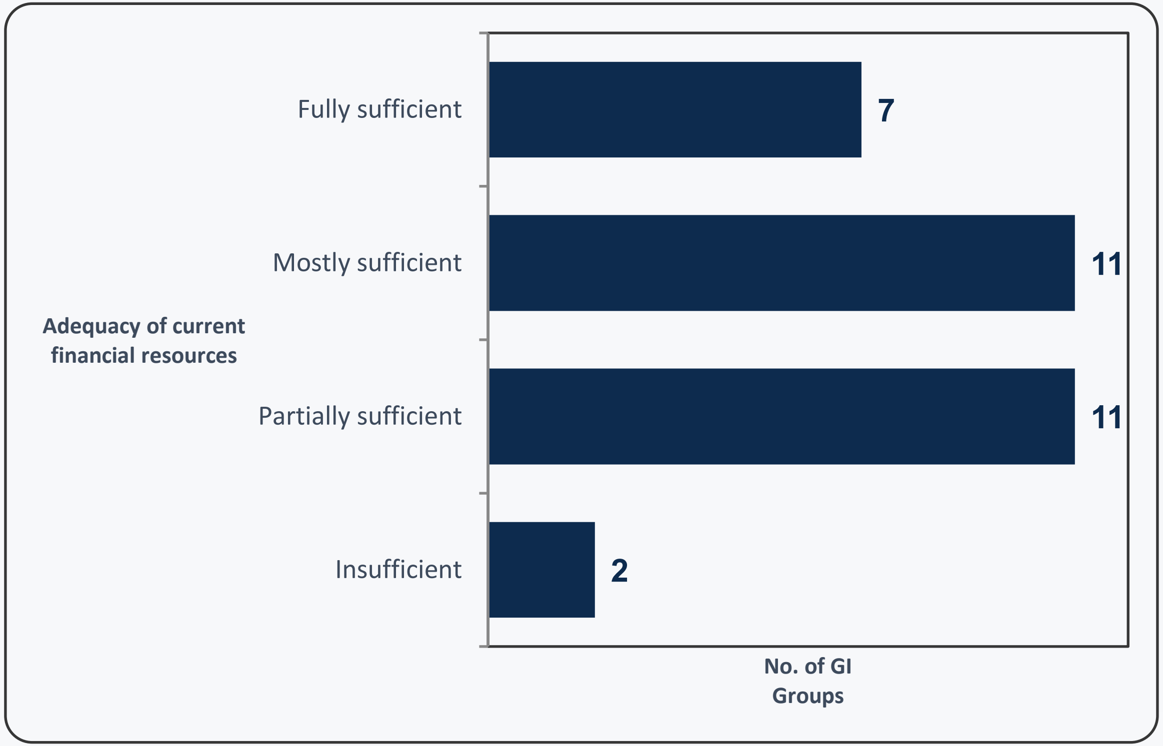


55% of GI groups reported budget increases in 2025 — 42% moderate, 13% significant — while 26% faced reductions.

The overall picture is cautiously positive, with more groups expanding resources than contracting them.

Adequacy of Current Financial Resources

Question: How would you assess the adequacy of your GI group's current financial resources to fulfil its mandate?



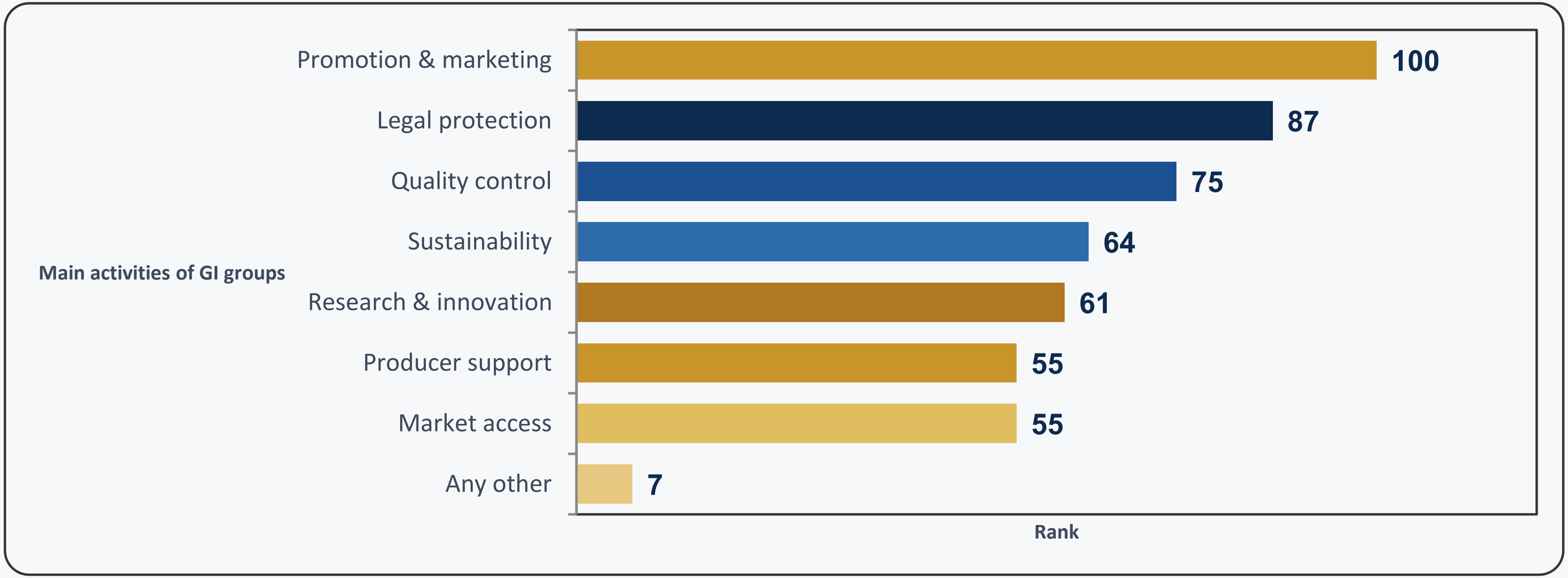
A majority of groups report sufficient or mostly sufficient financial resources.

This issue, however, evolves alongside expanding mandates, growing needs and changing of scenarios.

The challenges currently faced by the sector call for all GI groups to consider the adequacy of financial resources a priority.

Main Activities - Ranking

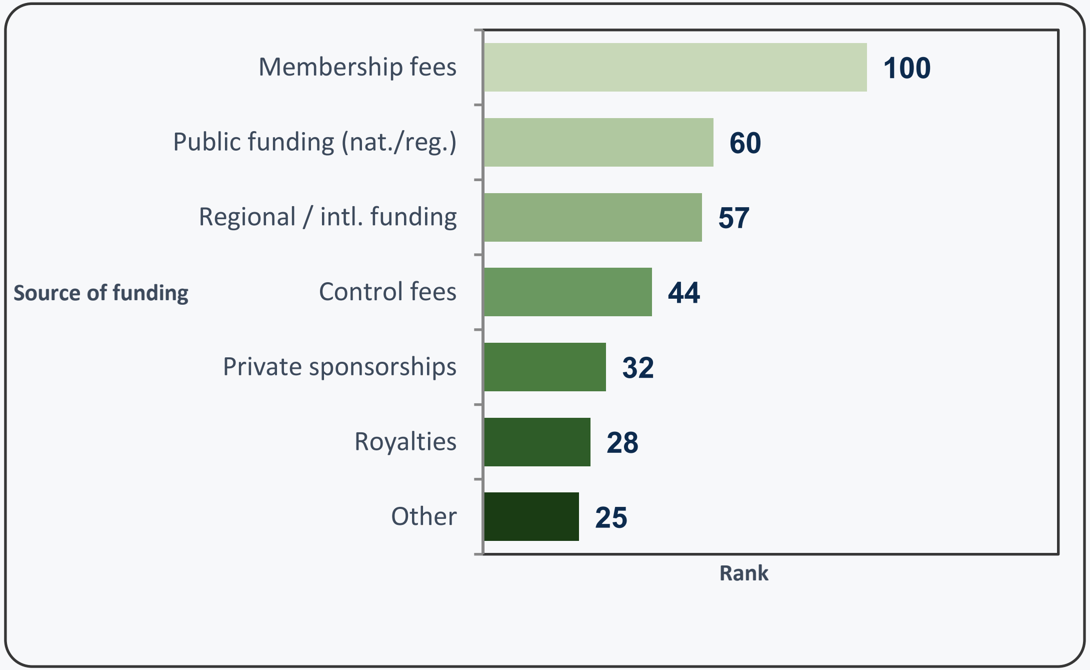
Question: Please rank the main activities of your GI group (100 = highest priority).



Key insight: Promotion & marketing and legal protection are the two dominant activities in both rankings and budgets, confirming they are priorities of most GI associations.

Sources of Funding —Ranking

Question: Please rank the main sources of funding of your GI group (100 = primary source).



Membership fees drive funding for 78% of GI groups.

Public and regional/international support are secondary sources, reflecting the importance of institutional support.

Royalties and private sponsorships play a minor role.

Control fees are specific to groups with control functions.

Main Priorities of GI Groups

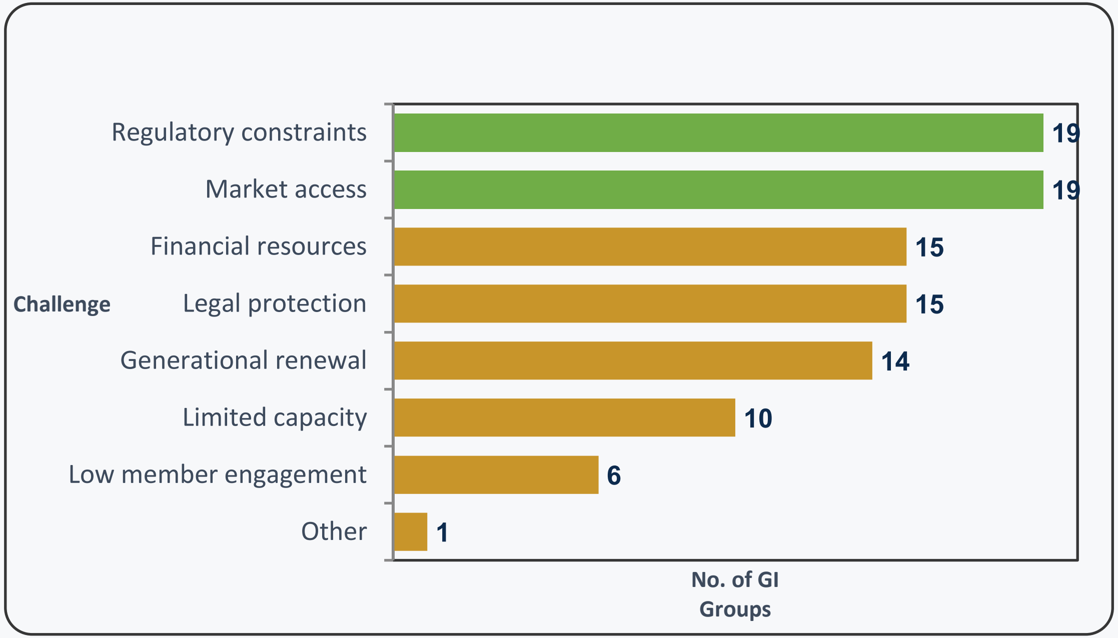
Question: What are the main priorities of your GI group? (multiple selection, 31 respondents)

Expanding market presence and enhancing legal protection top the priority list — cited by 68% and 65% of groups respectively, consistent with their dominance in activity rankings.

Improving governance and sustainability follow, reflecting an evolving agenda that looks beyond core commercial and legal functions.

Main Challenges Faced by GI Groups

Question: What are the main challenges faced by your GI group? (multiple selection — 31 respondents)



Regulatory constraints and market access lead. Financial resources, legal protection and generational renewal follow closely.

These top five challenges point to a sector navigating a complex mix of policy, funding and structural pressures.

Some Conclusions

Insights on the Economic Trends and Expectations

I

€73.1B turnover · €58.9B exports (80.6%) · 638,982 direct jobs · 1,057,214 km² covered — the 32-GI panel confirms GIs' enduring global economic impact.

II

Sales performance was more divided in 2025: 42% of GIs grew, 39% declined — reflecting intensified headwinds from global trade tensions, tariffs and geopolitical uncertainty.

III

Production costs rose for 77% of GIs, while 78% maintained stable workforces — demonstrating resilience in employment despite tightening margins.

Insights on the Economic Trends and Expectations

IV The GI sector enters 2026 with predominantly cautious expectations: 48% foresee unfavorable conditions — more pessimistic than 2025 — driven by persistent trade uncertainty and tariff risks.

V 94% of GIs plan to maintain or increase promotional investments, confirming the sector's long-term orientation toward market building and brand presence despite economic pressures. This is the pillar for GIs economic sustainability.

VI With 13.8 million annual visitors to GI facilities, GI-linked tourism is also emerging as a growing economic force to boost local economy.

Insights on GI Groups

I

GI groups are a pillar of the GI system, the foundation of its resilience and long-term credibility. 48% represent 100% of producers in their sector, confirming strong institutional legitimacy.

II

77% of GI groups report high or very high member involvement in strategic decisions — reflecting the collective, bottom-up governance model at the heart of GI system.

III

71% rate their governance as effective or very effective. 26% acknowledge room for improvement, highlighting opportunities for capacity strengthening across the network.

IV

Promotion & marketing and legal protection dominate both activity rankings and budgets — confirming these are the two core missions of GI associations worldwide.

Insights on GI Groups

V Membership fees are the primary funding source for 78% of GIs — a strength for self-sufficiency and a potential vulnerability for smaller groups with limited member bases.

VI Regulatory constraints and market access top the challenge list (cited by 61% each), followed by financial resource limitations affecting 47% of groups. However, the majority of GI groups feel resourced to fulfil their mandate reflecting a growing capacity to adapt funding models to evolving demands. This points to an increasingly mature and resilient GI community.

VII Expanding market presence and enhancing legal protection are the top two strategic priorities, reflecting the dual imperative of commercial growth and GI name integrity.

VIII oriGIn can play a key role by facilitating governance best practice exchange, advocating for adequate public funding, and supporting capacity building, especially for smaller groups in emerging economies.

oriGIn

Organization for an International Geographical Indications Network

oriGIn is the global alliance of GI groups – representing some 600 associations from 40 countries in the wine, spirit drinks, agricultural, craft and industrial sectors.

oriGIn is an international GI community where groups regularly interact with international organizations, law and technology firms, IP offices, universities, research centers, controls bodies and development agencies.

Join us to protect and add value to distinctive geographical names worldwide.

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