Around 600 foodstuffs, as well as 4000 wines and spirits, have a protected designation within the EU. The EU estimates annual sales of products protected by GIs at about €30 billion.

The case of Spain

In 2001 Spain counted 88 foods as well as 60 wines and spirits protected by PDO (Protected Designation of Origin), PGI (Protected Geographical Indication) and TSG (Traditional Speciality Guaranteed). The production value of goods benefiting from protected designations rose to € 2.2 billion, or 9% of production value for the given sectors, and close to 4% of the total production of the Spanish industry. There is quite a potential market, even if extra-Community exports represent, for the moment, only 2.3% of total production of goods protected by GIs.

The cheese sector in France and Italy

With 34 and 30 cheese designations, France and Italy are the first countries to register geographical indications in this sector.
The exports of PDO cheeses are largely based on a few products: Roquefort, Comté and Bleu d'Auvergne for France, Pecorino Romano, Grana Padano e Parmigiano Reggiano, and Gorgonzola for Italy.

Cheese sector (2001)

	Italy	France
	1000 tons	
PDO Production	441	186
Total Production	978	1.797
% PDO/total Production	45.1%	10.4%
Total Export	177	526
whose extra-EU	61	95
PDO Export*	77**	11
whose extra-EU	40**	n.a.
% PDO/total Export	43.5%	2.1%

* estimations
**the accurate figure should slightly exceed the figure indicated in the table.

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The EU Food and Drink Industry on the world markets

Facts and Figures

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The Voice of the European Food Industry

Agricultural products (including food and drink products) on world markets: performance of the EU

According to the most recent data published by the WTO, world trade in agricultural* products has increased to €547 billion euros. 29% of this amount represents trade between EU countries.

- The share of the extra-EU exports of agricultural* products in total world exports reached 10.6% in value terms. The EU is the number 2 exporter.
- The EU is the world largest importer of agricultural* products with a 13.5% share of total world imports.

Top agricultural* exporters (2001)

Countries	Value $ bn	Share in world trade %
United States	70.0	12.8
Extra-EU**	57.8	10.6
Canada	33.6	6.1
Brazil	18.4	3.4
China	16.6	3.0
Australia	16.6	3.0
Argentina	12.2	2.2
Thailand	12.1	2.2

Source: WTO

Top agricultural* importers (2001)

Countries	Value $ bn	Share in world trade %
Extra-EU**	79.8	13.5
United States	68.4	11.5
Japan	56.9	9.6
China	20.1	3.4
Canada	15.6	2.6
Mexico	12.8	2.2
Korea, rep of	12.5	2.1
Russian Fed.	11.4	1.9

Source: WTO

(*) For WTO trade statistics, the agricultural products include all food (fresh and processed), as well as certain inedible raw materials (skins, crude rubber, wood, pulp paper, textile fiber).
The share of food in total agricultural products has slightly increased to reach 80% in terms of value.

(**) Extra-EU: trade between the EU and third countries.

Trade of EU food and drink products

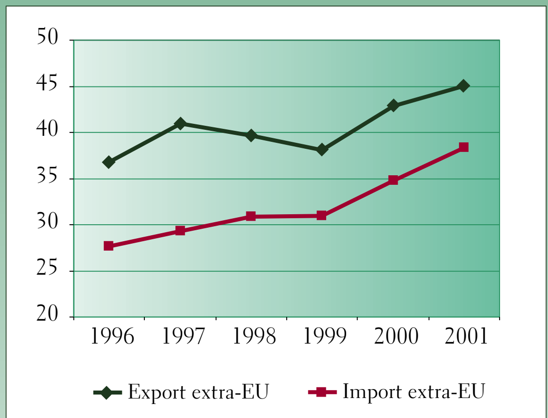
2001 and the first half of 2002 confirmed the increase in trade after the crises years of 1999 and 1998. The exports of Community food and drink products to third countries increased in 2001 (+ 5%) although this was still less than in 2000 (+12.5%). This data attests the dynamism and the capacity of resistance of the EU food and drink industry in a period of economic downturn.

Key figures: Extra-EU trade

	2001 € bn	January to June 2001 € bn	2002 € bn
Export extra-UE	45.0	21.4	22.5
Import extra-UE	38.4	18.5	19.0
Balance	6.6	2.9	3.5

Source: Eurostat

Trade of EU food and drink products (€ bn)



Source: Eurostat

Annual percentage increase of exports of food and drink products

	1997	1998	1999	2000	2001	2002*
F&D products	11.4%	-3.1%	-3.9%	12.5%	5.0%	4.7%

(*) 1st half 2002

Apart from the United-States which remains by far the largest recipient of EU exports, the trends by country reflect the international situation: significant increase in trade with the CEECs in the context of pre-accession stage, an upturn in exports to Russia, a major decrease in exports to Latin America and in particular Argentina.

In 2001, around 7.5% of European food production was exported to non-Community third countries. This figure places the food and drink industry in the middle in terms of export performance, far ahead of the wood and paper industries (3.7%), but well behind the chemical industry (16.6%) and the transport equipment industry (17.5%).

Imports: The major suppliers in food and drink products (2001)

Rank	Partners	€ bn	%
	World	38.4	100
1	Brazil	4.0	10.5
2	USA	3.4	9.0
3	Argentina	2.9	7.7
4	China	1.5	3.9
5	New-Zealand	1.5	3.9

Source: Eurostat

Exports: The major markets in food and drink products (2001)

Rank	Partners	€ bn	%
	World	45.0	100
1	USA	9.1	20.2
2	Japan	3.7	8.3
3	Switzerland	2.6	5.8
4	Russia	2.6	5.7
5	Canada	1.4	3.0

Source: Eurostat

Performance by sector for extra-EU exports

Sectors	2001 € bn	%
Beverages	13.3	29.4
Various food products*	11.5	25.5
Dairy products	5.2	11.5
Meat products	4.5	10.0
Animal and vegetables oils & fats	2.7	6.0
Processed fruit & vegetables	2.6	5.7
Fish products	1.9	4.2
Flour and starch products	1.8	4.0
Animal feed	1.2	2.6
Others	0.5	1.0
TOTAL	45.0	100

Source: Eurostat

(*) Confectionery, biscuits, food preparations, ...

The table highlights the four main food and drink exports for some Member States to third countries (in value) based on the NACE classification. It shows the importance of a single sector in one Member State with respect to the total EU exports in this sector, such as wines and spirits in France, meat products in Denmark, pasta in Italy or even beer in the Netherlands. For example, France exports 38% of EU wines and alcoholic beverages.

Trade specialisation in the Member States (2001)

F	Share in the extra-EU exports ot the sector
Wines & alcoholic bev.	38%
Dairy products	21%
Sugar	27%
Poultry meat	43%

NL	Share in the extra-EU exports ot the sector
Dairy products	23%
Beer	60%
Other food products**	18%
Fish products	17%

D	Share in the extra-EU exports ot the sector
Dairy products	14%
Meat products	20%
Other food products**	16%
Sugar	21%

** various food preparation, cheese fondues, soups…

I	Share in the extra-EU exports ot the sector
Wines & alcoholic bev.	14%
Processed fruit & veg.	25%
Pasta, couscous	86%
Dairy products	7%

UK	Share in the extra-EU exports ot the sector
Wines & alcoholic bev.	26%
Choco & sugar conf.	14%
Other food products**	9%
Dairy products	5%

DK	Share in the extra-EU exports ot the sector
Meat products	48%
Dairy products	11%
Fish products	20%
Other food products**	7%