



Organization for an International
Geographical Indications Network

oriGIn Survey 'GI Trends' Panel 2025

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

The oriGIn 'GI Trends' Panel

Since 2022, oriGIn monitors once a year the major trends affecting, and the sentiment of, GIs worldwide through a survey sent to some 25-30 GI associations selected with the objective to ensure a wide spectrum of turnover and export figures as well as global representation.

The GI Panel's composition slightly changes annually.

This initiative has the objective to strengthen the common identity of GIs worldwide as well as support the voice of GIs advocacy campaigns vis-à-vis policymakers.





Methodology

The oriGIn survey contains 5 core questions on economic trends and expectations plus 5 to 10 additional questions, formulated every year around a specific **‘trend topic’**.

The responses collected reflect data from 2024 as well as the economic sentiment in early 2025.

2025 trend topic: **GIs and Tourism**. The objectives are to analyze the role GIs have played in attracting tourists and developing tourism infrastructures over the last 10 years, as well as how tourism can be a marketing leverage for GIs.

2025 Survey Overview

The **2025 Panel** includes **28 associations**, representing GIs of **different economic sizes and sectors** (agricultural, wines, spirits and crafts), from **17 countries** across **5 continents**. Compared to 2024, 25 out 28 GIs remained in the Panel / 3 have been replaced.

Together with GIs among the **most relevant worldwide in terms of turnover and export**, the panel also surveys some small GIs crucial for the socio-economic life of their communities.

The objective is to provide a wide range of GI experiences, reflecting the existing variety at the global level (20.000 estimated recognized GIs internationally).





GI Group (in alphabetical order)	Country
Bayerischer Brauerbund e.V.	Germany
Bureau National Interprofessionel du Cognac	France
Comité Champagne	France
Comité Interprofessionel de Gestion du Comté	France
Consejo Regulador del Tequila	Mexico
Consejo Regulador DO Café Villa Rica	Peru
Consejo Regulador Jijona y Turrón de Alicante	Spain
Consorzio del formaggio Parmigiano Reggiano	Italy
Consorzio del Prosciutto di Parma	Italy
Consorzio di tutela Aceto Balsamico di Modena	Italy
Consorzio di tutela formaggio Grana Padano	Italy
Consorzio italiano tutela Mortadella Bologna	Italy
Consorzio per la Tutela del Franciacorta	Italy
Consorzio Prosecco DOC	Italy

2025 Panel



2025 Panel

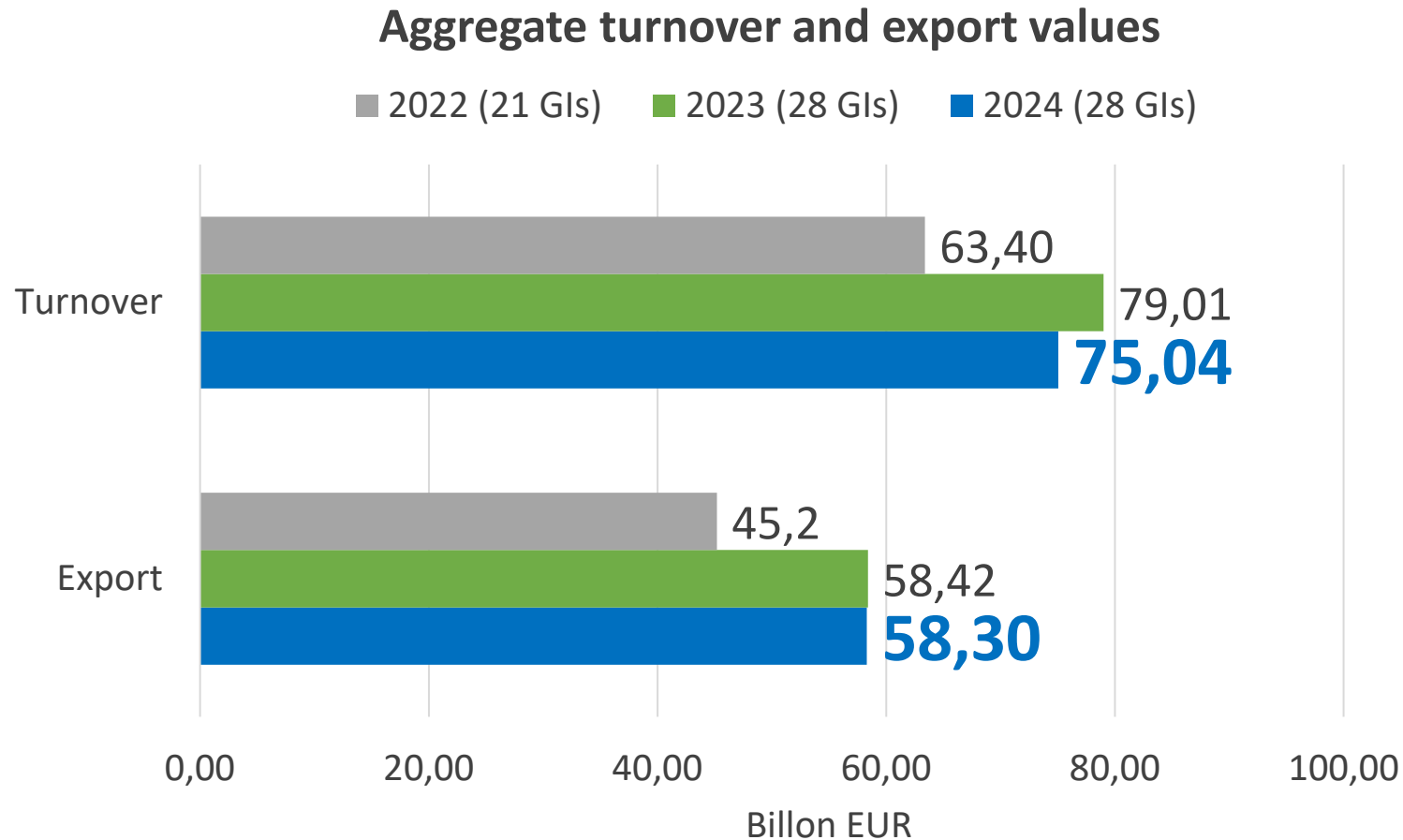
GI Group (in alphabetical order)	Country
Corporación Habanos S.A.	Cuba
Council of Tokaj Wine Communities	Hungary
Federación Nacional Cafeteros de Colombia	Colombia
Federation of the Swiss Watch Industry FH	Switzerland
Hangzhou West Lake Longjing Tea Co., Ltd	China
Idaho Potato Commission	USA
Instituto dos Vinhos do Douro e do Porto, IP (IVDP)	Portugal
Interprofession du Gruyère	Switzerland
Irish Whiskey Association	Ireland
Kanalani Ohana Farm (Kona Coffee)	USA
Mornington Peninsula Vignerons Association Inc	Australia
Napa Valley Vintners	USA
SA Rooibos Council	South Africa
Scotch Whisky Association	UK



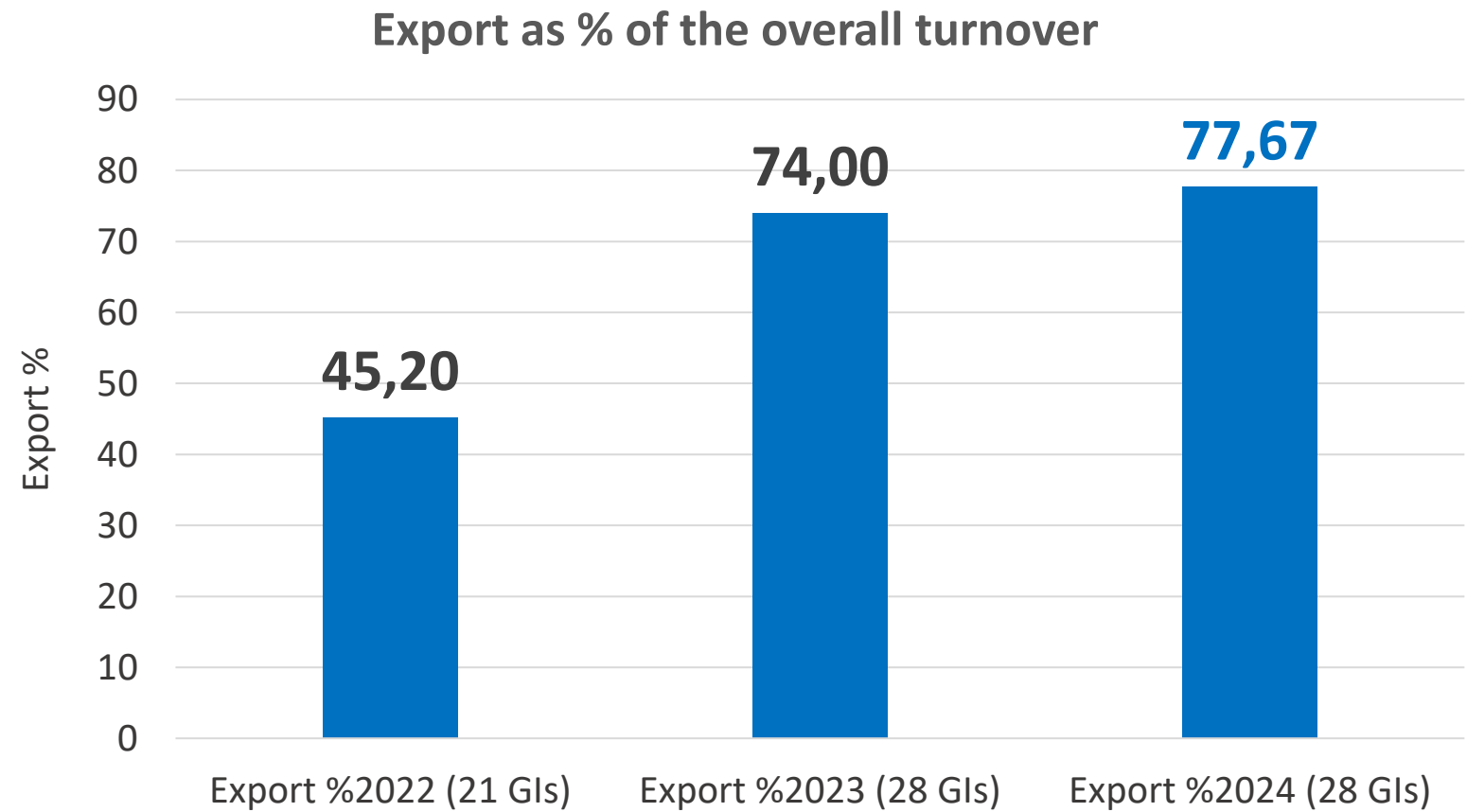
2025 Results



Aggregate turnover (at production level, in EUR) & export (2024 data compared with 2023 and 2022)

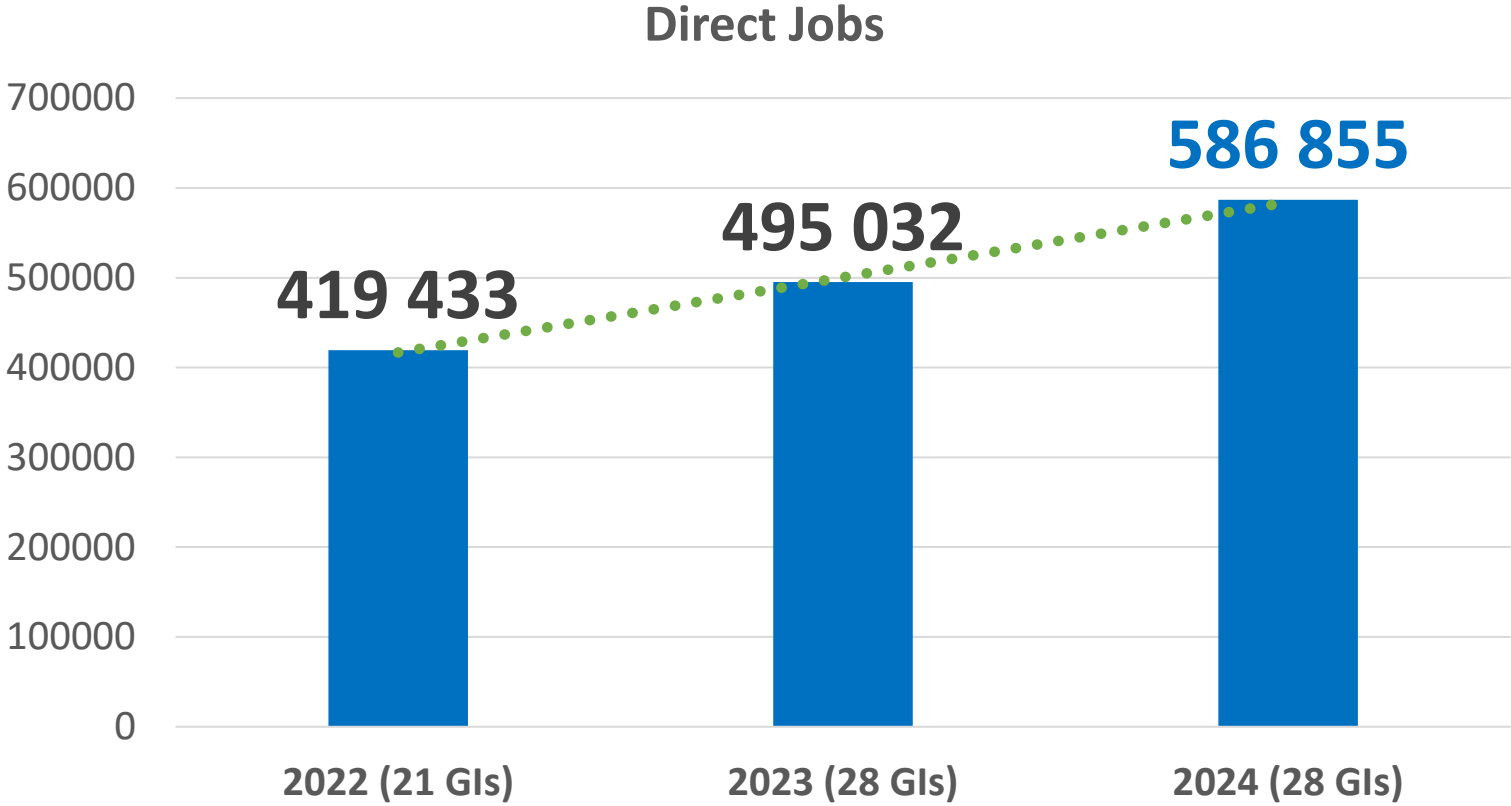


Aggregate export value (in EUR) (2024 data compared with 2023 and 2022)



Workforce

2024 data compared with 2023 and 2022





The overall
geographical area
(2024 data)

928.927 km²
(area)

A scenic landscape photograph. In the foreground, a steep hillside is covered in dense, vibrant purple heather. A narrow path or stream bed runs down the slope. In the middle ground, a calm lake reflects the sky, nestled between rolling green hills. The background features more distant hills under a dramatic sky with large, colorful clouds in shades of blue, pink, and orange, suggesting a sunset or sunrise. The overall mood is serene and majestic.

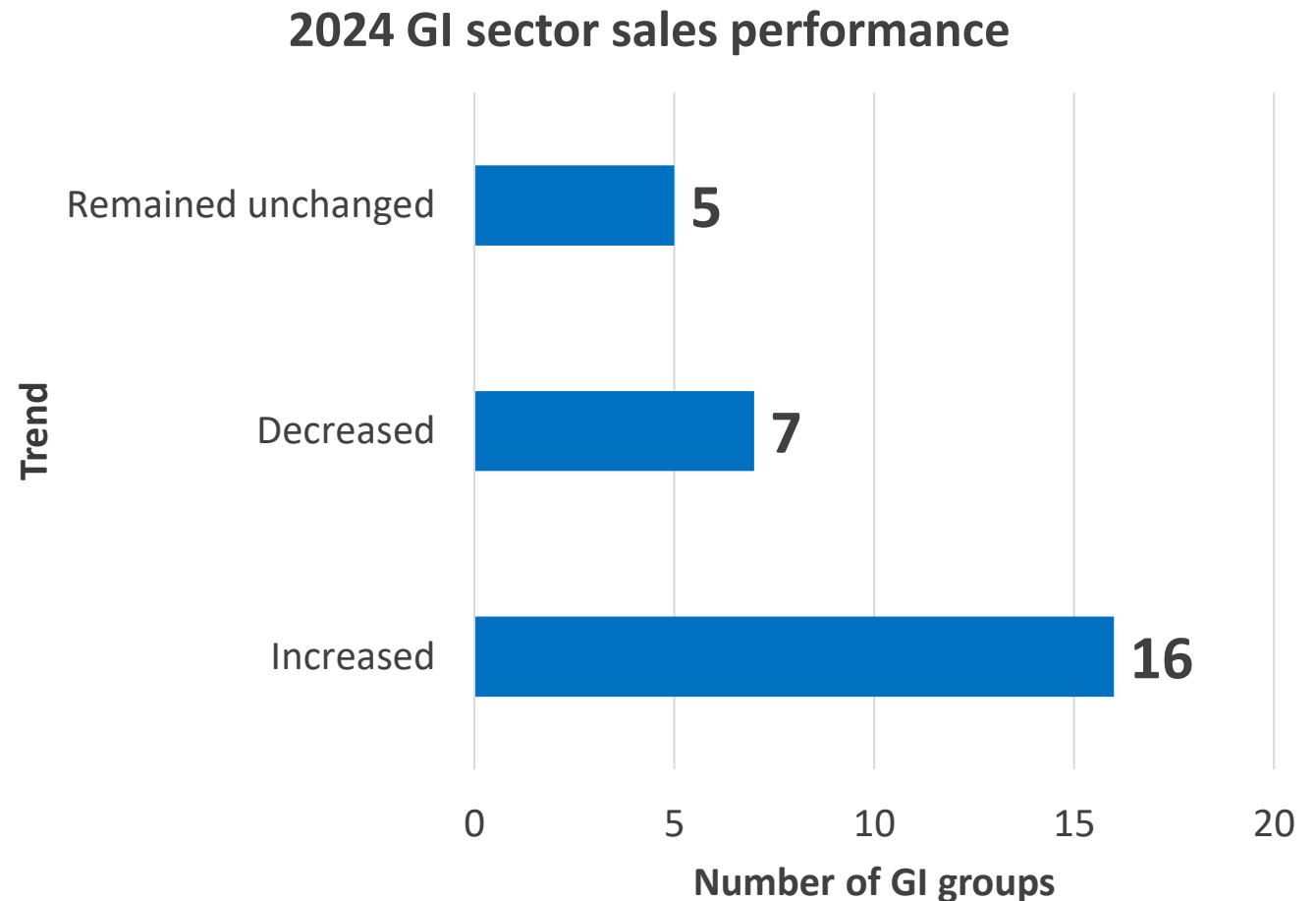
Trends affecting,
and sentiment of, GLs
worldwide

Question:

Compared to 2023, in 2024 the overall sale value of the GI you represent has:

Overall, in 2024 the sales performance reflects resilience. The majority (75%) demonstrated again strong adaptability, maintaining or increasing sales.

However, 25% experienced a decrease, likely due to a challenging market environment (production costs, uncertainty related to geopolitics and tariffs).

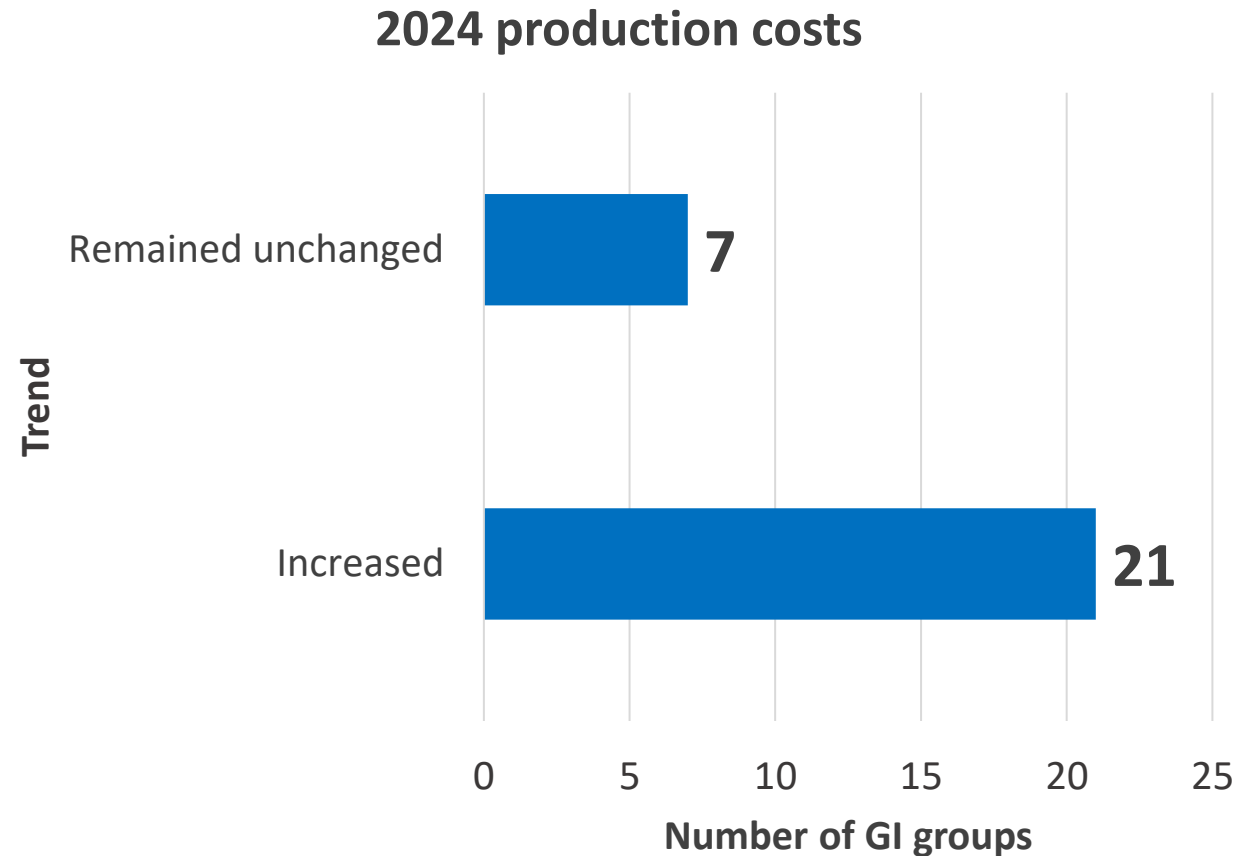


Question:

Compared to 2023, in 2024 the production costs within your GI value chain have:

In 2024, production costs continued to increase (due probably to the presenting effect of inflation).

This remains a challenge for businesses which need to balance rising production costs with profitability.

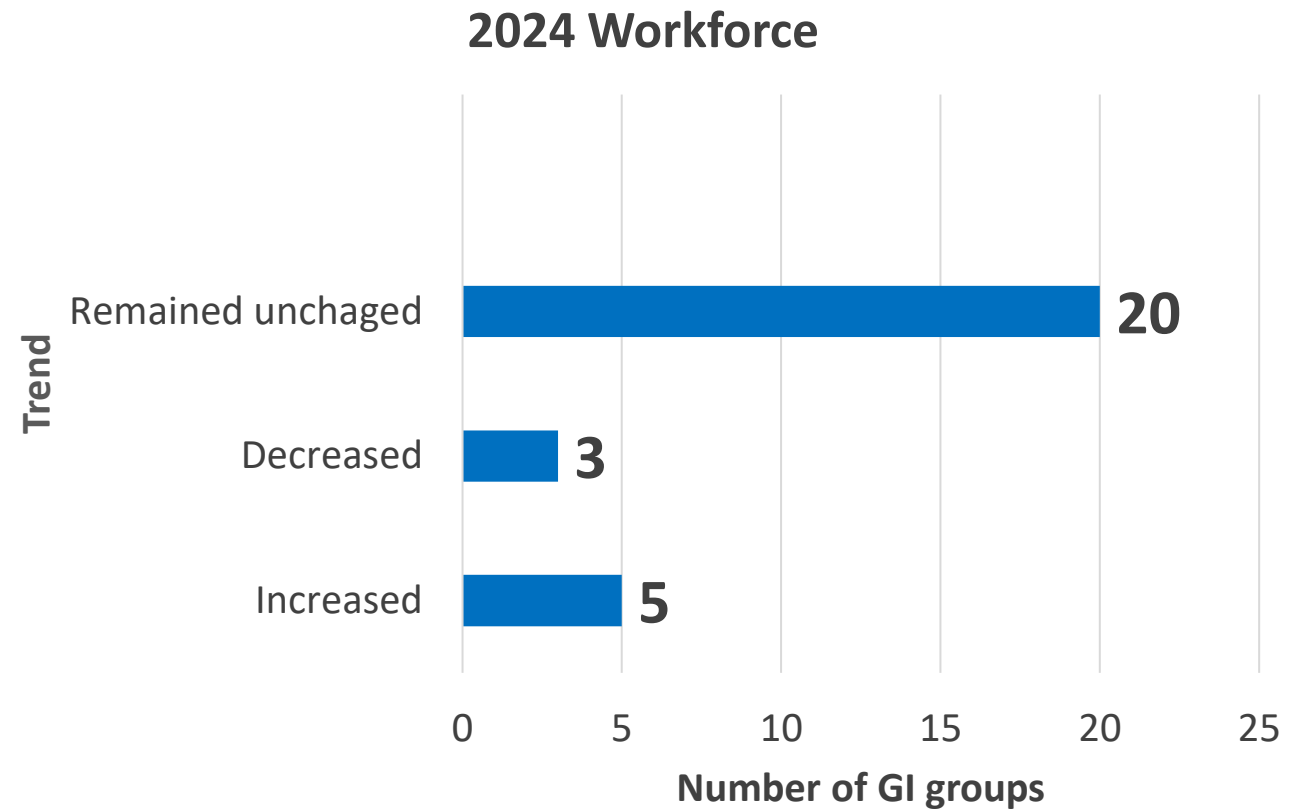


Question:

Compared to 2023, in 2024 the overall workforce within your GI value chain has:

In 2024, workforce levels among the interviewed GI groups showed mostly stability. The 89% of GIs maintained or increased their workforce, and only 11% reported a decrease.

This overall resilience, in spite of a challenging economic scenario, shows the sector's long-term commitment to preserving employment and maintaining its social impact in the area of origin.

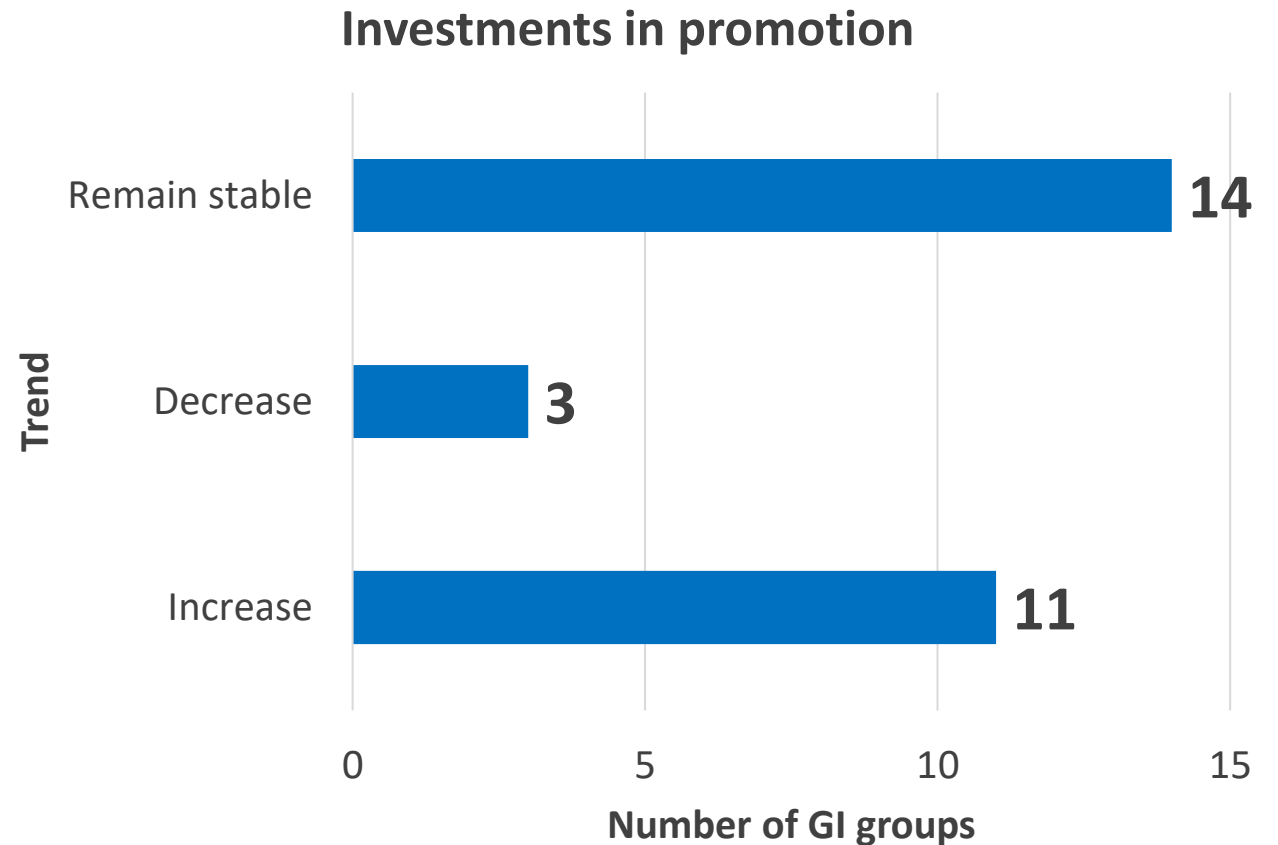


Question:

Compared to 2024, investments in promotion – by both the GI group and its members – in 2025 are expected to:

In 2024, investment in promotion remained stable for half of the GIs (50%), while 39% increased their efforts, demonstrating a proactive approach to market positioning despite economic pressures.

Only 11% reported a decrease, indicating that most GIs continue to view promotion as a strategic priority and the GI sector long term approach.

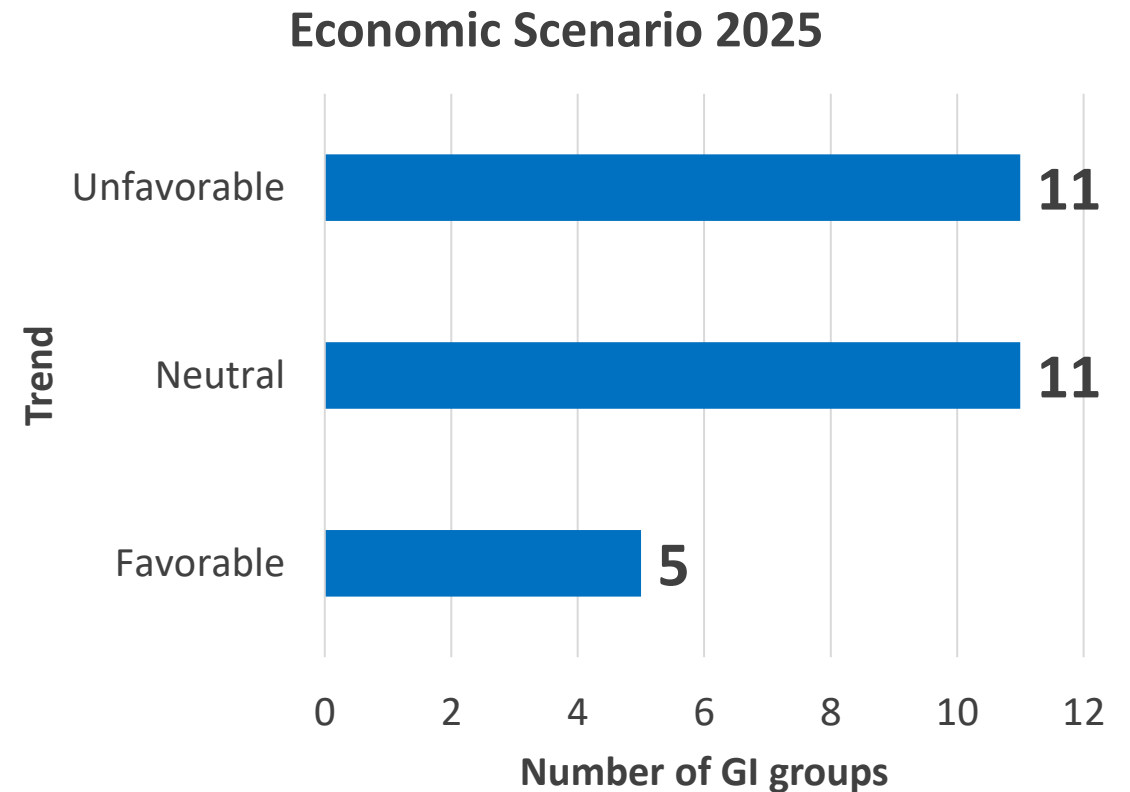


Question:

From the point of view of the GI you represent, the overall 2025 economic scenario looks :

As we look ahead to 2025, expectations within the sector are divided. 39% of GIs foresee unfavorable conditions, while another 39% expect a neutral environment. Only 18% are optimistic.

This reflects the uncertainty of the global scenario, including increasing production costs, geopolitics and tariffs.





2024 Trend Topic: GIs and Tourism



Why 'GIs and Tourism' as 2025 trend topic

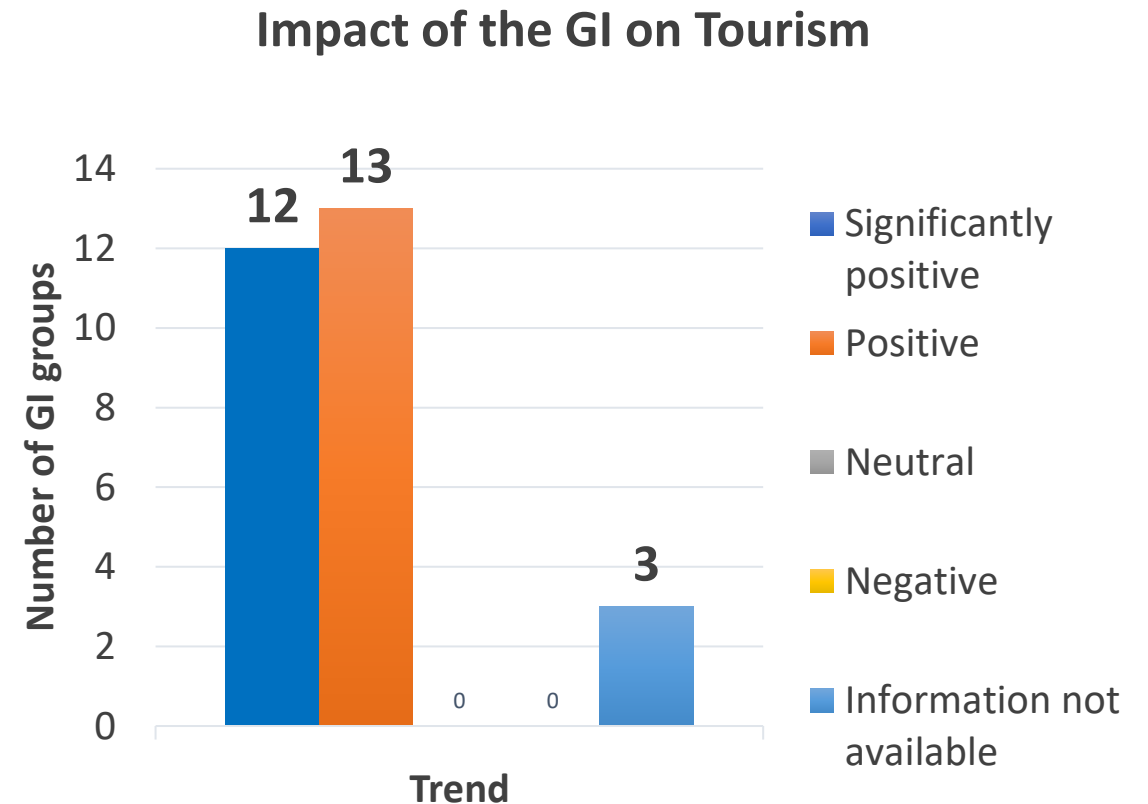
- Over the last few years, there has been a growing interest for the interplay between GIs and Tourism.
- GIs as an instrument to attract tourists.
- Tourism as a marketing leverage for GIs.
- Tourism initiatives and GI “experience” marketing, touching upon consumers’ emotions.
- Issues which deserve attention as they are promising for the future of the sector.

Question:

Over the last 10 years, the impact of the GI you represent on the tourism attractiveness/visibility of the corresponding region has been:

Over the past decade, GIs have contributed significantly to enhancing the tourism appeal and visibility of their regions.

Survey data indicate that 43% of respondents observed a significant positive impact, while an additional 46% reported a generally positive effect—underscoring the strategic role of GIs in promoting regional tourism.

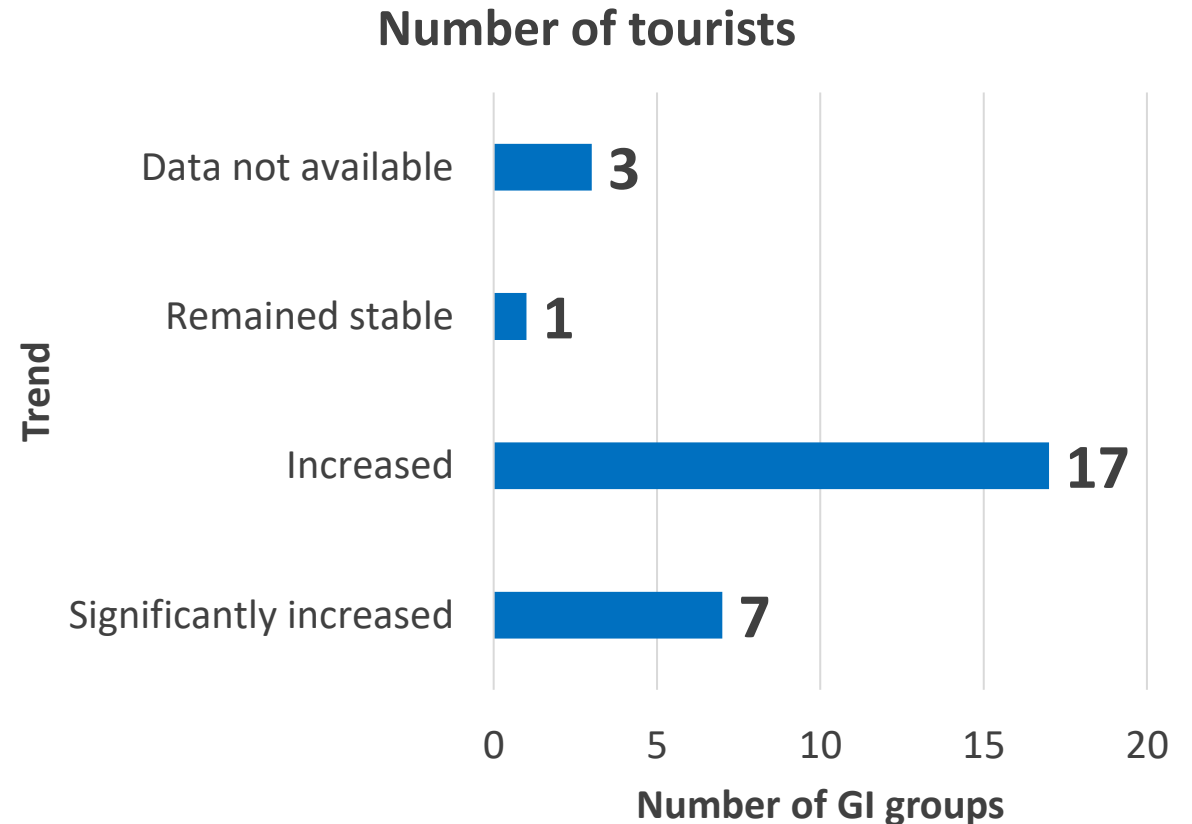


Question:

Over the last 10 years, the number of tourists who have visited your GI facilities (farms, production fields, craft laboratories, transforming factories, museums, ...) has:

Over the past decade, tourist visits to GI facilities have demonstrated a consistent upward trend. According to survey responses, 61% of participants reported an increase in visitor numbers, with 25% noting a significant rise. Only 4% indicated that tourist levels remained stable.

These findings highlight the growing appeal of GI-related attractions and their role in driving tourism to local areas.





Indicative average
annual figure of
tourists who have
visited your GI
facilities over the
last 10 years
(2024 data)

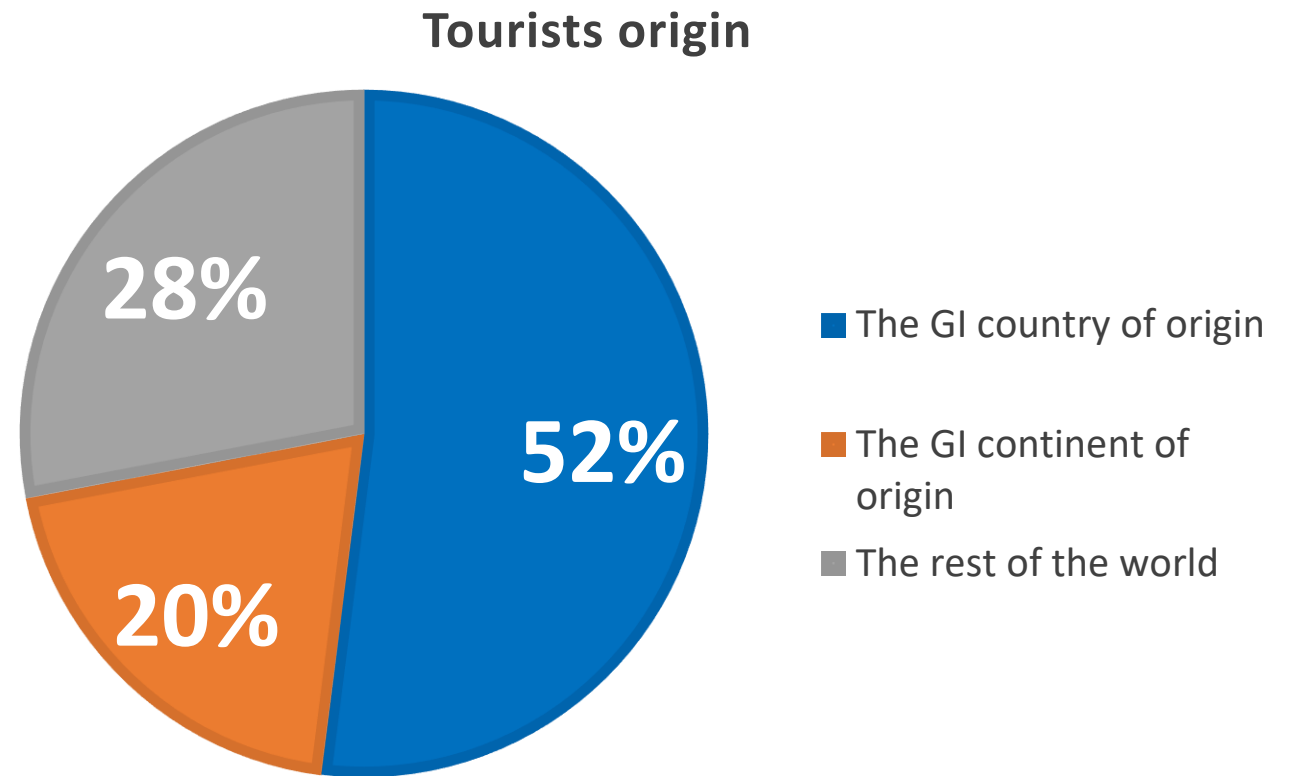
32.525.378
(annual visitors)

Question:

Over the last 10 years, the majority of tourists who have visited your GI facilities (farms, production fields, craft laboratories, transforming factories, museums, ...) were coming from:

Most tourists visiting GI sites come from the GI's country of origin (52%), followed by 20% from the continent and 28% from the rest of the world.

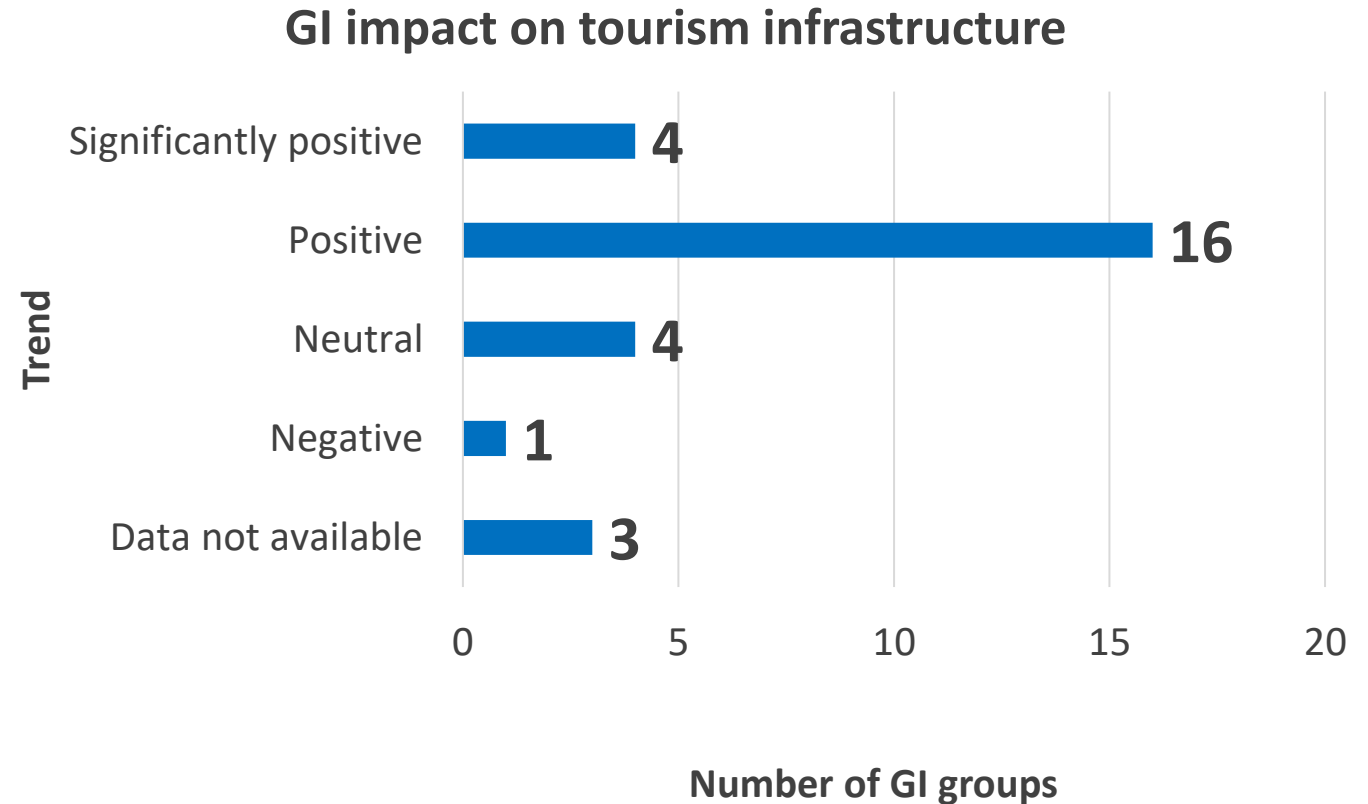
This highlights strong local engagement and growing international interest, positioning GIs as effective promoters of their 'terroir'.



Question:

Over the last 10 years, the impact of the GI you represent on the development of tourism infrastructures/facilities (hotels, roads, trains, airports, restaurants, GI museums, ...) in the corresponding region have been:

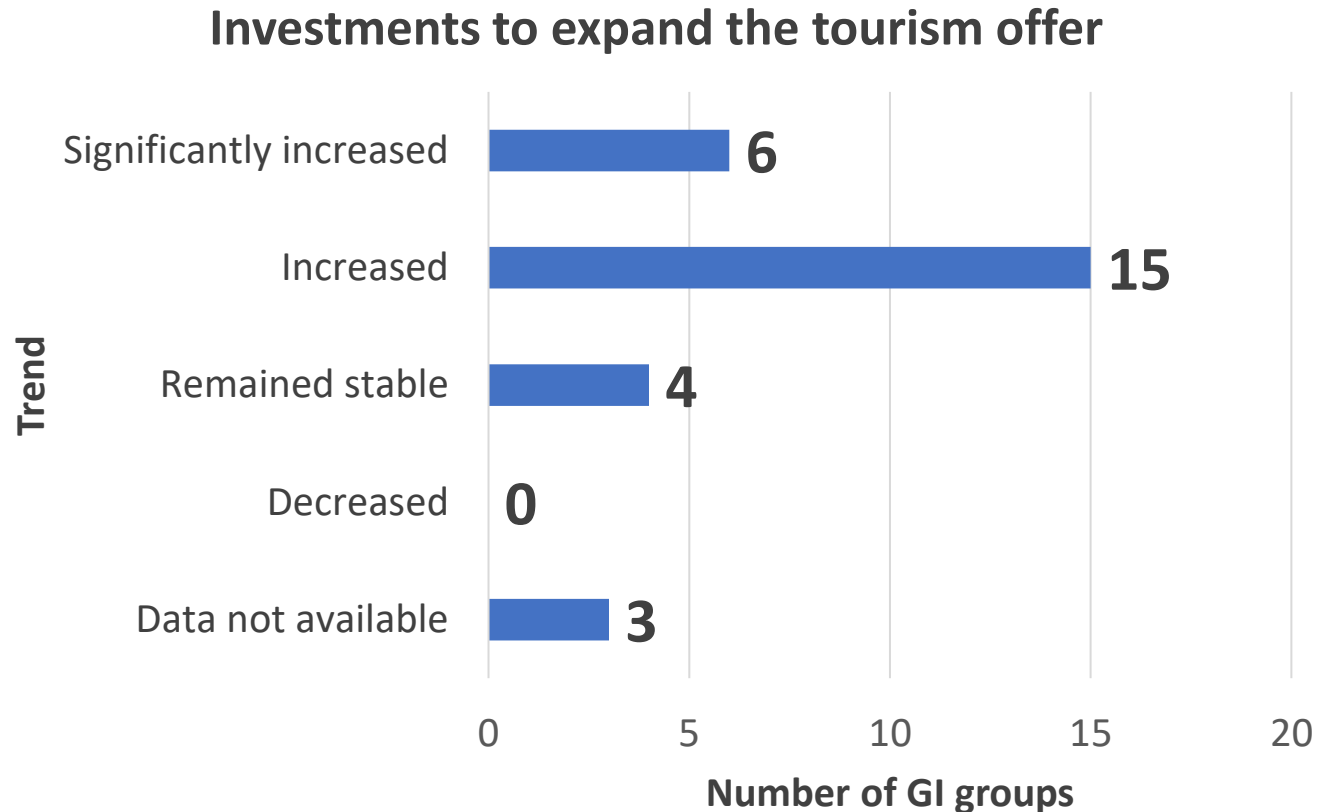
The data indicate that GIs had a predominantly positive influence on the development of tourism-related infrastructure and facilities in their respective regions.



Question:

Over the last 10 years, the investments by your group and/or GI stakeholders to expand the tourist offer in the corresponding geographical area has:

The survey indicates a positive trend in tourism development linked to GIs, with 80% of respondents reporting increased investments to expand the regional tourist offer.



Best practices of investments undertaken ("experience" marketing)

GI promotion
campaigns

Festivals and
special events

Dedicated
museums and
educational spaces

Thematic and
technical programs

Hospitality services
within GI premises
(hotels,
restaurants, etc)

Guided visits and
on-site experiences

Partnerships with
strategic providers
(Airlines, media)

Tourist routes and
itineraries

Specialized units
for tourism
development



Question:

Over the last 10 years, the impact of the GI you represent on the marketing strategies/communication campaigns of public and private tourism stakeholders (local authorities, hotels, restaurants, ...) in the corresponding region has been:

The results indicate that GIs have played a significant role in shaping tourism marketing strategies in their regions. A combined 76% of respondents reported a strong impact on the communication efforts.

This highlights the strategic value of GIs in regional tourism branding and promotion.



Examples of marketing initiatives undertaken



Public engagement:

Exhibitions, markets, museums, school programs , training institutions, and tourism expos



Media campaigns:

Publicity boards, lectures, videos, self-media, and advertising



Strategic use of GI:

Promoting GI as a tourism driver and marketing asset



Collaborations:

Local brand partnerships



Tourism promotion:

GI routes and international GI events



Digital platforms:

Use of communication and tourism-focused platforms

A scenic landscape photograph. In the foreground, a steep hillside is covered in dense, vibrant purple heather. A narrow path or stream bed runs down the slope. In the middle ground, a calm lake reflects the sky, nestled between green fields and rolling hills. The background features more distant hills under a dramatic sky with scattered clouds, some tinged with pink and orange light, suggesting a sunset or sunrise. The overall mood is peaceful and natural.

Some conclusions

Insights on the economic trends and expectations

- I. The 2025 'GI Trends' Panel confirms the global impact of GIs as powerful tools for sustainable economic development. With **€75.04 billion in turnover, €58.30 billion in exports (78%), over half a million** direct jobs, and nearly 929,000 km² of land represented by the panel of 28 GIs.
- II. Despite economic, trade and geopolitical challenges, **the GI sector remained resilient in 2024**. Most GIs maintained or expanded their workforce, sustained or increased sales, and maintained investments in promotion, reflecting both adaptability and a long-term strategic vision.
- III. These trends confirm that **GIs across sectors are global drivers of inclusive growth and economic resilience**. They continue to serve as long-term assets for regional development, cultural preservation, and international trade.

Insights on the economic trends and expectations

- IV. The GI sector enters **2025 with cautious expectations** due to geopolitical and trade uncertainty as well as persisting rising production costs.
- V. This highlights the need for **continued strategic planning** and adaptation by GI value chains and **support by policymakers.**



Insights on GIs and Tourism

- I. **Impressive figures on the impact GIs have on tourism:** above all, the annual average of 32.3 million visitors, on average more than 1 million tourists per year for each of the 28 GIs of the panel.
- II. **Blending heritage with innovation** enhances the appeal of GI destinations, attracting a diverse audience while maintaining local authenticity through a combination of tradition, culture and gastronomy.
- III. **GI tourism initiatives**, such as routes, museums, special events, site visits, and cultural festivals, strengthen the appeal of GI regions, turning them into nationally and internationally recognized tourism destinations.
- IV. Meanwhile, **tourism represents a marketing leverage for GIs** as consumers increasingly look for “experiences” and emotions.

Insights on GIs and Tourism

- V. **GIs & Tourism: a win-win development model**, which attracts tourists (generating additional incomes of their territories and communities), promoting at the same time GI products among tourists. This is true for GIs independently of their size, sector and continent (representing a strong potential for developing countries and emerging economies).
- VI. Public-private collaboration offers a vital opportunity to strengthen the role of GIs in **sustainable tourism** and regional development by aligning policy frameworks with private-sector investment. GI regions recognized as **UNESCO World Heritage Sites** exemplify the powerful impact of coordinated efforts.
- VII. **oriGIn** can play a role in advancing the '**GI-Tourism development model**' by facilitating the exchange of best practices among groups, promoting partnerships as well as the international visibility of projects and initiatives, and advocating for targeted policies at the national, regional and international level.



Organization for an International
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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

