

GRANA PADANO

The most consumed PDO cheeses in the world

Report 2022

September 2022





INTRODUCTION, OBJECTIVE AND METHODOLOGY

Introduction – Policy

THE EU QUALITY SCHEMES

The European Union has established a **specific scheme** (and respective regulation) to **protect, promote and preserve traditional food & beverage products**. Specifically, the «*EU quality policy aims at protecting the names of specific products to promote their unique characteristics, linked to their geographical origin as well as traditional know-how*». Furthermore, “*product names can be granted with a 'geographical indication' (GI) if they have a specific link to the place where they are made. The GI recognition enables consumers to trust and distinguish quality products while also helping producers to market their products better.*

Products that are under consideration or have been granted GI recognition are listed in quality product registers.

The registers also include information on the geographical and production specifications for each product.”

Geographical indications (GIs) comprise of:

- PDO – Protected Designation of Origin (food and wine)
- PGI – Protected Geographical Indication (food and wine)
- GI – Geographical Indication (spirit drinks and aromatized wines).



Farm to Fork Strategy: for a fair, healthy and environmentally-friendly food system

“The Commission will monitor the implementation of the Unfair Trading Practices Directive³⁰ by Member States. It will also work with co-legislators to improve agricultural rules that strengthen the position of farmers (e.g. producers of products with geographical indications), their cooperatives and producer organisations in the food supply chain” ... “In parallel, it will strengthen the legislative framework on geographical indications (GIs) and, where appropriate, include specific sustainability criteria”

Introduction - The regulatory framework

A **Protected Designation of Origin (PDO)** is a name which identifies a product:

- originating in a specific place, region or, in exceptional cases, a country;
- whose quality or characteristics are essentially or exclusively due to a particular geographical environment with its inherent natural and human factors;
- the production steps of which all take place in the defined geographical area.

PDOs as well as PGIs are regulated under **Regulation (EU) No 1151/2012 on quality schemes for agricultural products and foodstuffs**.

According to the EU legislation, both EU and third countries' (non-EU) producers can register their products as PDO (and PGI).

The Commission has established and maintains a **publicly accessible updated register** of protected designations of origin and protected geographical indications recognized under this scheme (eAmbrosia) fulfilling the provision of Article 11. In fact, the protection afforded by the abovementioned regulation upon registration, should be equally available to designations of origin and geographical indications of third countries that meet the corresponding criteria and that are protected in their country of origin.

This study takes into account cheeses registered as PDO in the EU official public register eAmbrosia.



**Protected
Designation of
Origin**

Objective

The objective of this report is to answer the following question:

WHICH IS THE MOST CONSUMED PDO CHEESE IN THE WORLD?

The Grana Padano cheese Consortium has been promoting the PDO cheese across Europe through different advertising media by using the following claim: «**Grana Padano DOP, the most consumed PDO cheese in the world**» since 2020.



This claim is not just based on the belief the Grana Padano is a popular and well known cheese across multiple countries. As a matter of fact, Grana Padano is a cheese with a Protected Designation of Origin, unlike many other famous cheeses such as Gouda (generic), Edamer (generic), Emmentaler which are not GIs. Secondly, among the PDO cheeses, the Grana Padano is widely considered leader in terms of volume produced and sold annually.

However, **no official public data has yet been published to prove this claim.**

Therefore this report aims at providing accurate facts and figures regarding the estimated consumption of PDO cheeses against other PDO cheeses, in order **to assess which is the most consumed among the 199 registered products in the European Union.**

HOW DO WE PROVE WHICH PDO CHEESE IS THE MOST CONSUMED IN THE WORLD?

Provided that **no data has ever been collected** about the actual amount of PDO cheese consumed at global level for multiple reasons, such as:

- PDO cheeses are consumed at home and away from home (as ingredients by the food service);
- PDO cheeses are exported to several countries;
- PDO cheeses are often niche products or made by very few manufacturers and little data are publicly available;
- PDO cheeses retail sales data (i.e. IRI, Nielsen) are available only in some countries and aggregated only for some of these cheeses (each country employs different tracking methodologies).

a **major assumption** is needed: **the most consumed PDO cheese in the world is the PDO cheese which is sold the most in volume terms** (sales values cannot be considered a reliable proxy since price could act as a bias due to the value that each market confers to the product). Therefore, since there is no way to collect actual sales data at the retail and foodservice level (for the abovementioned reasons), this report analyzes **the total cheese ex-fabrika sales volumes**.

Methodology/2

The **amount of cheese manufactured can be considered a reliable proxy for the amount of ex-factory sales within a definite time span** (i.e. year).

As a matter of fact, dairy companies tend to limit the storage time (beyond the ageing period) – due to short shelf life and/or to storage costs – and to market the product as soon as it gets ready for consumption. However, production is not a reliable proxy **when the time lag between production and sale is significant** (that is when the sale thus consumption occurs several months after the actual production). This is the case of long-ageing cheeses such as Parmigiano Reggiano and Grana Padano: in this case, **ex-fabrica sales/warehouse shipments are the most reliable proxy for total consumption.**

Cheese type	Ageing time (months)	Proxy for total consumption
Fresh cheese	0-6	Cheese production/ex-fabrica sales
Short-medium ageing	6-9	Cheese production/ex-fabrica sales
Long ageing	>9	Cheese ex-fabrica sales/ warehouse shipments

Normally, the PDO product specifications define the minimum ripening period which means that the price might differ significantly within the same PDO (for instance, the Parmigiano Reggiano is required to ripen for at least 12 months but the ageing period could reach up to 60 months). However, in the current report, Nomisma referred to each cheese **considering the bulk of the production for each PDO cheese.**



GI AND PDO PRODUCTS IN THE EU

Highlights

- According to the EU GI official register, in August 2022 there were almost 3,477 food and beverage products awarded with a PDO, PGI or TSG quality scheme. The total sales value of agricultural products and foodstuffs covered by GIs and TSGs in 2017 was euro 25 billion*.
- The four largest categories of agricultural products and foodstuffs sold under GIs in terms of the number of registrations are fruit & vegetables + cereals, cheeses, meat products, fresh meat, and oils & fats.
- The top three MSs in terms of agri-food GIs registered products (Italy, France and Spain) gather 48% of the total number of products. More specifically, 315 registered products in Italy are responsible for 20% of the total number of registered food GIs; France with 257 registered products is responsible for 16% and Spain with 200 registered products is responsible for about 13%.
- A more specific focus on PDO food products shows that the largest product categories marked with this scheme are cheese, fruit & vegetables + cereals, oils & fats, and fresh meat whereas Italy, France and Spain are the leading producers of PDOs in terms of number of registered products.
- There are currently 199 PDO kinds of cheese registered in the EU, about 78% of the total GI cheeses.
- According to the most recent report issued by the EU Commission, in 2017, the total sales value of cheeses covered by GIs and TSGs reached euro 9.03 billion of which 7.38 billion were made by PDOs.
- Furthermore, among the MSs producing cheese, Italy, France and the Netherlands are the largest cheese GI (PDO+PGI) producers and accounted for 82% of the total EU cheese sales value in 2017 (no new update regarding sales value is available at the moment).



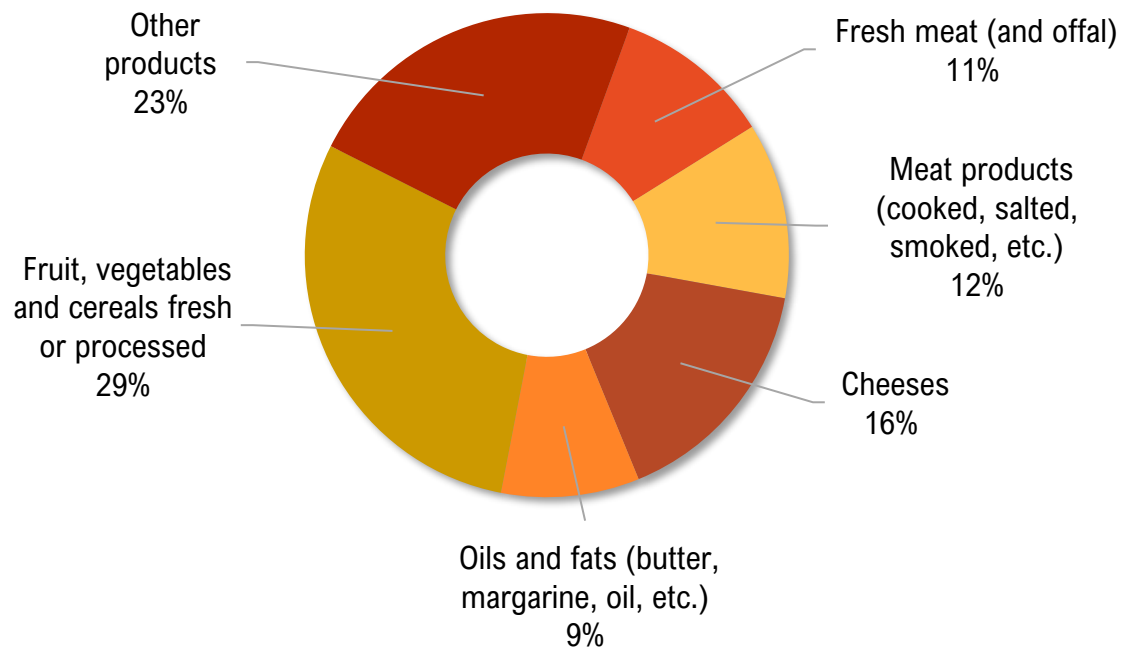
*No data updates available after 2017 in the last EU Commission report (2021).

GI registered products (2022*)

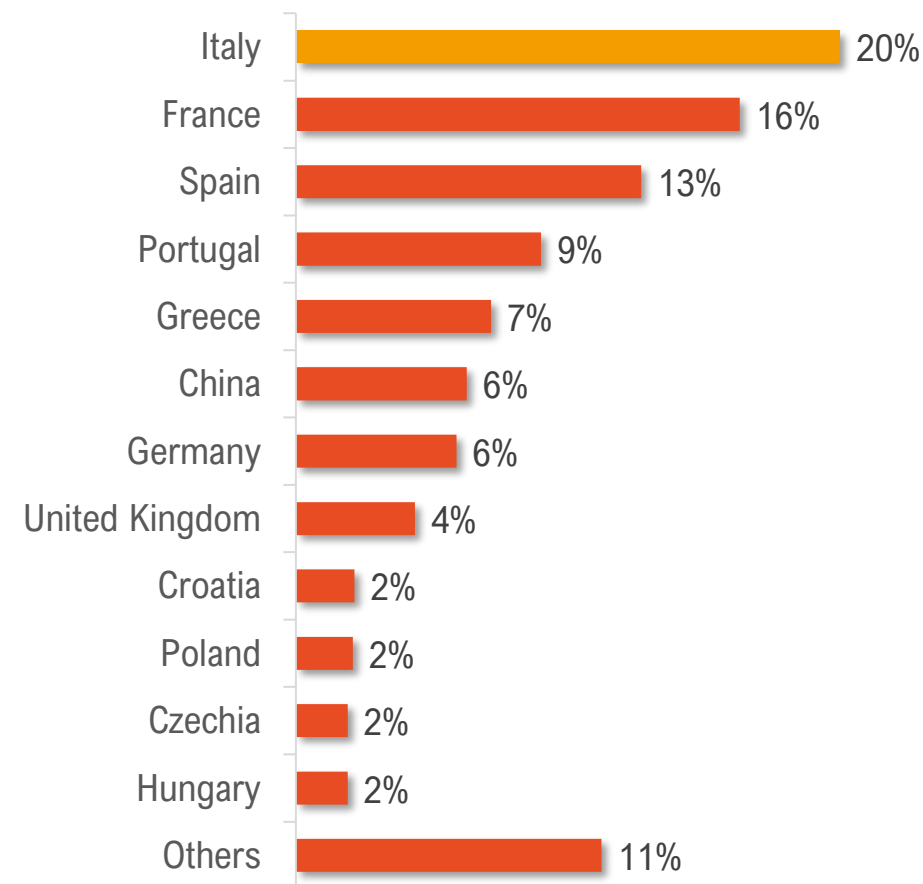
3,477 REGISTERED GIs° (FOOD, WINE, AND SPIRITS)

1,592 REGISTERED FOOD GIs

% share of GI food products by product category



% share of GI food products by country



*As of August 2022

°Number of Protected Designation of Origin (PDO) and Protected Geographical Indication (PGI)

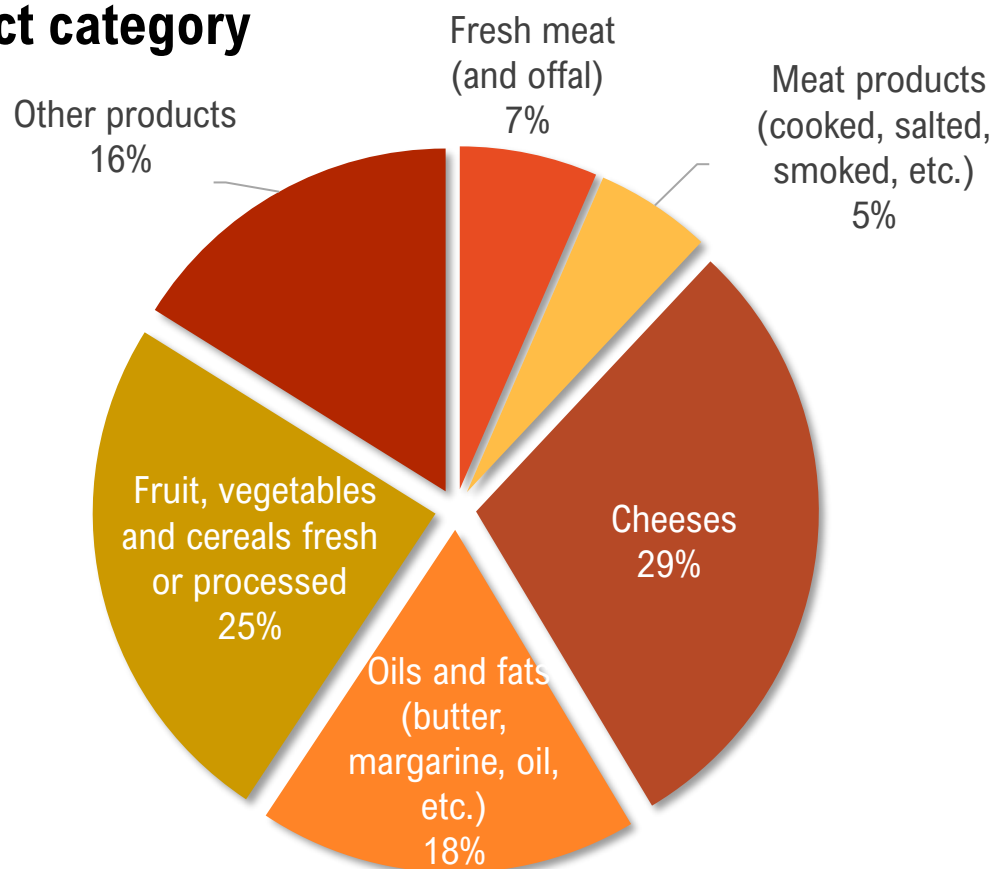


Number of PDO registered food products (2022*)

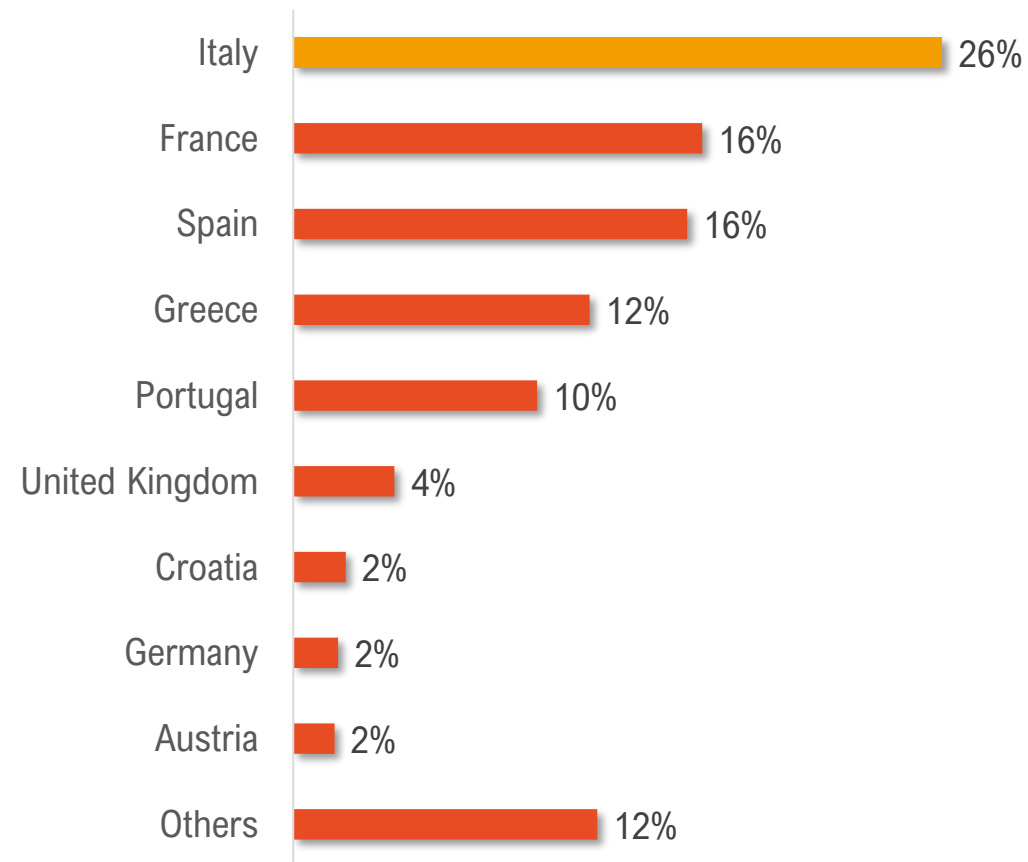
676 registered food PDOs*



Product category



% share of PDO food products by country



*As of August 2022

Registered GI cheeses

Number of registered cheeses (2022*)

Total GIs*

254

PDO*



199

78%

of total EU GI cheese

Sales value° (billion €, 2017)

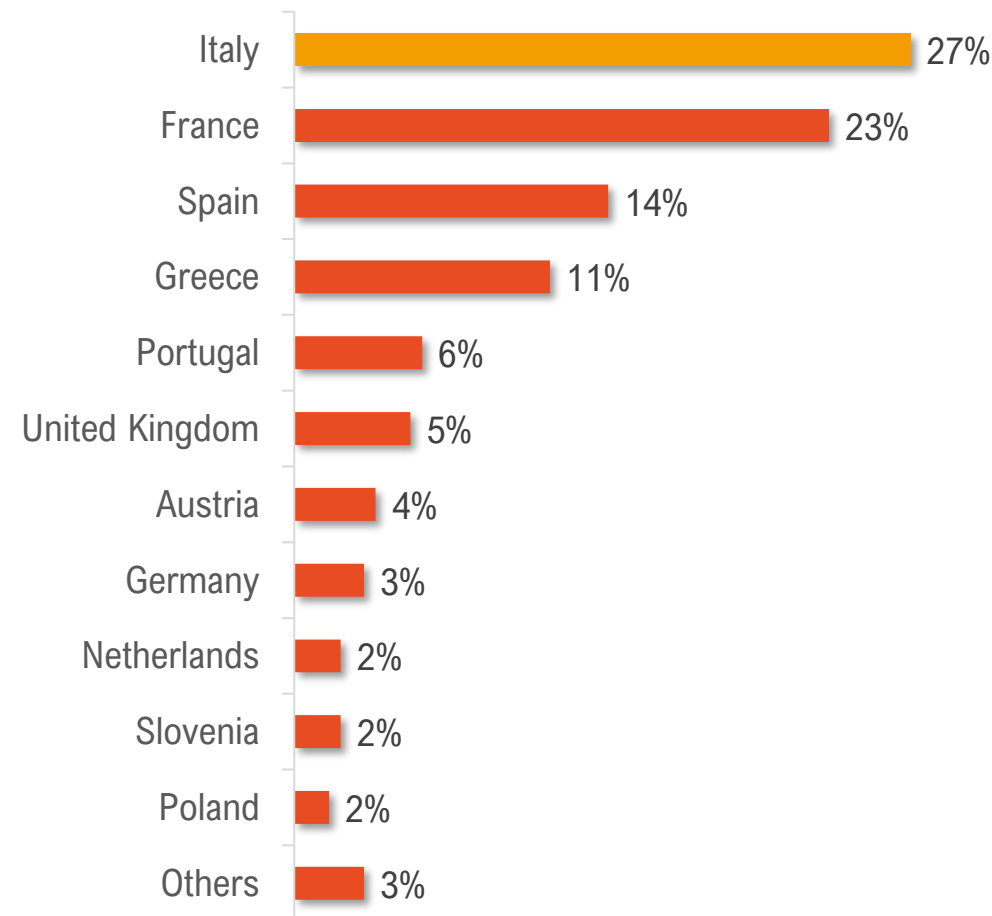
9.0

7.4

82%

of total EU GI cheese

% share of PDO cheeses by country (number, 2022*)



* As of August 2022

° Sales value of cheese under PDO in EU, 2017

PDO and PGI cheeses: total sales and ranking

Sales value of cheeses under GIs (PDO+PGI) by TOP MS in the EU

	Million € 2017*	% share 2017	Million € 2020	Variation rate 2020/2017
Italy	3,930	44%	4,176	6%
of which: Grana Padano PDO	1,197	13%	1,364	14%
France	1,928	21%	2,173	13%
Netherlands	1,559	17%	na	na
Greece	793	9%	na	na
Spain	284	3%	320	13%
United Kingdom	148	2%	na	na
Denmark	121	1%	na	na
Germany	85	1%	na	na
Other MS	144	2%	na	na
Total	8,993	100%	na	na

na: not available

The Grana Padano PDO cheese alone, in 2017, was responsible for 13% of the total EU PDO-PGI sales value, almost matching the total aggregated sales value of the Greek, Spanish, and German GI cheeses. In the period 2017-2020, the available data show a higher increase in France and Spain, compared to Italy. However, Grana Padano's growth is similar to that of these countries (+14% variation rate 2020/2017).



THE TOP10 MOST CONSUMED PDO CHEESES: KPI

Top 10 PDO cheeses in the EU (2021)

A list of the best seller of PDO cheese has been drawn from the 2017 TOP 5 Member states listed in the table above Italy, France, Netherlands, Greece, and Spain. These 5 countries aggregate 152 PDO cheeses, about 76% of the total registered PDO cheeses.

Country		PDO	Sales (volume, tonn)		
			2019	2020	2021
Italy	1	Grana Padano	199,292	203,606	203,290
Italy	2	Parmigiano Reggiano [^]	149,857	157,482	163,647
Greece	3	Feta [*]	110,686	122,596	na
Netherlands	4	Noord-Hollandse Gouda [°]	78,313	79,241	77,476
France	5	Comté	57,338	68,312	72,368
Italy	6	Gorgonzola	60,309	61,205	63,106
Italy	7	Mozzarella di Bufala Campana	50,176	50,677	53,766
Italy	8	Pecorino Romano	26,939	30,909	34,282
Italy	9	Asiago	20,682	23,065	21,969
Spain	10	Queso Manchego	15,313	15,755	16,029

[^] Production

^{*} Data refers to industrial production (Feta cheese and PDO Feta cheese) excluding artisanal production.

[°] Potential production (Nomisma estimates: see next page)

na: not available



In 2019-2020-2021, **Grana Padano**, was the most sold, thus consumed PDO cheeses in the world



NOORD-HOLLANDSE GOUDA



No official production, sales and price data are disseminated for confidentiality reasons. Therefore, estimates are needed in order to assess the actual production of this PDO cheese.

First of all, according to the COKZ (the Dutch official certification body responsible for PDO and PGI products certification), only 2 dairy companies are certified to make the Noord-Hollandse Gouda PDO Cheese:

1. FrieslandCampina's cheese production location in Lutjewinkel
2. CONO cheese factory in the Beemsterpolder.

According to the respective websites, the Lutjewinkel facility, on an annual basis, processes 420 million kilograms of milk into cheese while the Cono factory processes milk into 34,000 tons of cheese (not only NH Gouda). In other words, the total combined cheese production is more than 79,000 tons per year, which is not all NH Gouda PDO.

However, more calculations have been performed in order to double check these figures and verify the data accuracy. According to the PDO product specifications (as stated in the application for registration documents), Noord-Hollandse Gouda is only prepared from milk obtained in the Province of Noord-Holland. Therefore, assuming all the milk produced in this region and delivered to dairies is destined to the NH Gouda, Nomisma calculated the amount cheese obtained from the quantity of milk collected by the dairy farms located in this area (prudential estimation, data includes self consumption).

		2019	2020	2021
1	Avg milk per cow per year (kg)	8,880	8,913	8,809
2	Number of dairy cows (Noord-Holland)	88,190	88,901	87,949
3 = 1 X 2	Total milk production (tonnes)	783,128	792,411	774,764
4 = 3 X 10%	Cheese production (tonnes)	78,313	79,241	74,476



List of PDO registered cheese*- ITALY



Raschera	Pecorino Sardo	Squacquerone di Romagna
Asiago	Pecorino Siciliano	Bitto
Bra	Pecorino Toscano	Valtellina Casera
Caciocavallo Silano	Provolone Valpadana	Valle d'Aosta Fromadzo
Canestrato Pugliese	Quartirolo Lombardo	Ragusano
Casciotta d'Urbino	Robiola di Roccaverano	Spressa delle Giudicarie
Castelmagno	Taleggio	Stelvio / Stilfser
Fiore Sardo	Toma Piemontese	Pecorino di Filiano
Fontina	Formaggio di Fossa di Sogliano	Pecorino di Picinisco
Formai de Mut dell'Alta Valle Brembana	Provolone del Monaco	Puzzone di Moena / Spretz Tzaori
Gorgonzola	Casatella Trevigiana	Strachitunt
Grana Padano	Provola dei Nebrodi	Pecorino Crotonese
Montasio	Pecorino del Monte Poro	Pecorino delle Balze Volterrane
Monte Veronese	Vastedda della valle del Belice	Silter
Mozzarella di Bufala Campana	Piacentinu Ennese	Nostrano Valtrompia
Murazzano	Formaggella del Luinese	Ossolano
Parmigiano Reggiano	Piave	Mozzarella di Gioia del Colle
Pecorino Romano	Salva Cremasco	



*As of August 2022

List of PDO registered cheese*- FRANCE



Picodon	Ossau-Iraty	Bleu du Vercors-Sassenage
Bleu de Gex Haut-Jura / Bleu de Septmoncel	Pouligny-Saint-Pierre	Rocamadour
Brie de Meaux	Pont-l'Évêque	Morbier
Camembert de Normandie	Reblochon / Reblochon de Savoie	Chevrotin
Cantal / Fourme de Cantal	Roquefort	Tome des Bauges
Chaource	Saint-Nectaire	Pélardon
Chabichou du Poitou	Sainte-Maure de Touraine	Rigotte de Condrieu
Comté	Salers	Charolais
Crottin de Chavignol / Chavignol	Selles-sur-Cher	Brie de Melun
Époisses	Brocciu Corse / Brocciu	Brousse du Rove
Fourme d'Ambert	Abondance	
Laguiole	Beaufort	
Langres	Bleu d'Auvergne	
Livarot	Bleu des Causses	
Maroilles / Marolles	Banon	
Mont d'Or / Vacherin du Haut-Doubs	Mâconnais	
Munster / Munster-Géromé	Fourme de Montbrison	
Neufchâtel	Valençay	



*As of August 2022

List of PDO registered cheese*- GREECE



Φέτα / Feta

Γραβιέρα Αγράφων / Graviera Agrafon

Πηχτόγαλο Χανίων / Pichtogalo Chanion

Κοπανιστή / Koranisti

Φορμαέλλα Αράχovas Παρνασσού / Formaella Arachovas Parnassou

Γραβιέρα Κρήτης / Graviera Kritis

Σαν Μιχάλη / San Michali

Κατίκι Δομοκού / Katiki Domokou

Μετσοβόνε / Metsovone

Κεφαλογραβιέρα / Kefalograviera

Γραβιέρα Νάξου / Graviera Naxou

Λαδοτύρι Μυτιλήνης / Ladotyri Mytilinis

Καλαθάκι Λήμνου / Kalathaki Limnou

Αρσενικό Νάξου / Arseniko Naxou

Ξύγαλο Σητείας / Ξίγαλο Σητείας / Xygalo Siteias / Xigalo Siteias

Σφέλα / Sfela

Ανεβατό / Anevato

Κασέρι / Kasseri

Μανούρι / Manouri

Γαλοτύρι / Galotyri

Μπάτζος / Batzos

Ξυνομυζήθρα Κρήτης / Xynomyzithra Kritis



*As of August 2022

List of PDO registered cheese*- SPAIN



Cabrales	Queso Camerano
Idiazabal	Queso de l'Alt Urgell y la Cerdanya
Mahón-Menorca	Queso de Murcia
Picón Bejes-Tresviso	Queso de Murcia al vino
Queso Nata de Cantabria	Torta del Casar
Queso de La Serena	Queso Ibores
Queso Manchego	Afuega'l Pitu
Queso Tetilla / Queixo Tetilla	Queso Majorero
Queso Zamorano	Queso Palmero / Queso de la Palma
Quesucos de Liébana	Gamoneu / Gamonedo
Roncal	
Arzúa-Ulloa	
Cebreiro	
San Simón da Costa	
Queso Casín	
Queso de Flor de Guía / Queso de Media Flor de Guía / Queso de Guía	



*As of August 2022

List of PDO registered cheese*- OTHER COUNTRIES



PDO	COUNTRY	PDO	COUNTRY
Paški sir	Croatia	Oscypek	Poland
Lički škripavac	Croatia	Redykołka	Poland
Allgäuer Bergkäse	Germany	Queijo de Évora	Portugal
Allgäuer Emmentaler	Germany	Queijo Serpa	Portugal
Allgäuer Sennalpkäse	Germany	Queijo S. Jorge	Portugal
Altenburger Ziegenkäse	Germany	Queijo de Azeitão	Portugal
Odenwälder Frühstückskäse	Germany	Queijo Terrincho	Portugal
Weißlacker / Allgäuer Weißlacker	Germany	Queijo Rabaçal	Portugal
Imokilly Regato	Ireland	Queijo de Nisa	Portugal
Boeren-Leidse met sleutels	Netherlands	Queijo Serra da Estrela	Portugal
Noord-Hollandse Gouda	Netherlands	Queijo da Beira Baixa	Portugal
Noord-Hollandse Edammer	Netherlands	Queijo do Pico	Portugal
Kanterkaas / Kanternagelkaas / Kanterkomijnekaas	Netherlands	Queijo de Cabra Transmontano / Queijo de Cabra Transmontano Velho	Portugal
Bryndza Podhalańska	Poland	Caşcaval de Săveni	Romania

*As of August 2022





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