

Executive Summary

**SPECIAL REPORT FOR STRENGTHENING THE
INTERNATIONALISATION OF BUSINESSES – BRANDED &
CERTIFIED FOODS**

PROJECT TEAM

Executive Brief

Special Report for Strengthening the Internationalisation of Businesses: Branded & Certified Foods

1. The strategic fact: a large market, a 2.01% share — and in 2025 more kilos, more cheaply

Greek exports across the sixteen classes of the basket reached €4,076.3 million in 2025, up from €1,836.2 million in 2019, an annual rate of 14.2% — a figure corresponding to roughly one tenth of Greek goods exports. Demand, however, is of another order: EU-27 imports in the same classes came to €135,403.4 million; €2,721.0 million of the €4,076.3 million goes there, a Greek share of 2.01%. The base is growing fast, yet it remains marginal in a market with no tariff threshold.

- Exports to all destinations are heavily concentrated: cheeses €1,074.8 million, olive oil €920.4 million (the whole of class HS 1509; the eight-digit code appears in section 3) and table olives €750.2 million together account for 67.4% of the 2025 value.
- The momentum does not follow the size: yoghurt 21.3% a year, coffee 17.8%, bakery products 17.0% — highly processed categories, where the value is added inside the country. In yoghurt and bakery products, though, the growth is in quantity rather than value: in yoghurt the volume rose 164.9% and the average unit value by only 20.3%. The widening of the base is real; the upgrading of the value is still pending.
- The reference market divides in two: eight classes of Greek raw material or protected designation, with a 4.59% share, and eight classes of industrial processing, with a 0.79% share — the single exception being yoghurt (10.62%). The position is more than proportional in the raw material (olives 25.98%, olive oil 12.98%); the real headroom lies in cheeses (an EU-27 market of €26,641.9 million, Greek share 3.05%) and in pasta (€5,970.5 million; 1.29%).
- The serviceable field — Germany and France — comes to €46,208.0 million, 34.1% of the reference market, with Greek penetration of 1.51% (3.97% in the eight classes of primary advantage): Germany €27,657.1 million at 1.96% (5.11% in the eight), France €18,550.9 million at 0.84% (2.09% in the eight).
- Over the six years: value +122.0%, volume +61.7%, average unit value +37.3%. In 2025, however, the average unit value turned negative: its index (base year 2019) peaked at 150.8 in 2024, during the international food price cycle, and fell back to 137.3 — volume +19.5%, average unit value –8.9%. Unit value is not a price index — it is consistent with bulk supply without proving it — which is why the two indices are always monitored separately (Tables B.5c and B.5d).

2. The local reality: the exporter flag begins above a certain size — and certification goes unused

In the ASDA territory the KAD 10 extraction yields seventy active businesses with a turnover of €342.7 million and 2,226 employees in 2023. Eleven of the seventy carry the exporter flag: 15.7% of the businesses, but 43.3% of the turnover. The check against GEMI (21 August 2026) shows the composition of the base: forty-eight units carry a principal KAD in division 10 (€246.6 million, 72.0% of the base) and twenty-two are in trade, primary production, food service and winemaking (€96.1 million, 28.0%); counting secondary KAD as well, activity in division 10 is confirmed for fifty-seven of the seventy. The scope of branded and certifiable foods, the eleven classes, narrows to twenty units with €60.1 million — 17.5% of the turnover of the base — and 706 employees, well established and uneven in scale, with a single unit accounting for 44.0% of the scope's turnover. Four carry the exporter flag, holding 53.4% of the scope's turnover, across four different categories: experience that is

complementary, not competing. The categories of Greek export advantage are almost absent: two olive oil units, one cheesemaker, none packing honey, none in fish products.

The cross-check with the certification registers gives a clear picture: not one of the seventy businesses in the base — nor of the eighty-two in the five-year extraction — was found in the PDO and PGI registers of ELGO-DIMITRA, matched by company name rather than by VAT number, while five businesses (7.1%) hold an entry in the organic register of the Ministry of Rural Development and Food, and only two of the twenty in scope (10.0%). With the requirement to pack inside the demarcated area, the geographical indication is a distinctly narrow route; the organic one is open and almost unused. Decisive, however, is the way the flag scales with size: among the forty-eight units of division 10, where six of the eleven carry the flag, the rate is 0.0% below €500 thousand, 9.1% at €0.5–2 million, 18.2% at €2–10 million and 75.0% above €10 million. The gradient does not record a difference in product quality but a cost of entry that is fixed and not proportional to volume — per certification, per product code, per trade fair — and unbearable for the five units in scope whose turnover does not exceed one hundred thousand euro. It therefore defines what the intervention is for: the bridge between the four units that carry the flag and the sixteen that do not.

3. The real problem is unit value — and the counter-example of feta

Extra virgin olive oil gives the clearest picture. In 2025, 55.4% of the value of Greek exports under CN code 1509 20 00 went to Italy at €4.73 per kilo, while the next eleven principal destinations paid a weighted €7.28 per kilo, and €7.37 in Germany; the dispersion ratio of the others against the largest comes to 1.54. If the 95.6 thousand tonnes of the Italian flow had been sold at the German unit value, they would have been worth €704.9 million instead of €452.4 million, a difference of €252.5 million in one year and one product. The calculation is hypothetical: a measure of the order of magnitude of what is at stake, not a forecast. The gap is structural and it is widening. In 2024, at the peak of international prices, Germany paid €10.43 per kilo and Italy €7.03; Italy's share of Greek exports of the whole of class HS 1509 rose from 40.1% in 2019 to 57.1% in 2025. The fastest-growing flow is the one of lowest value.

The phenomenon is not inevitable. Feta, with exports of €835.1 million in 2025, sold at almost the same level everywhere: €7.48 per kilo in Germany, €7.76 in Italy, €9.23 in the United States, with a weighted unit value for the others of €8.03 and a dispersion ratio of 1.07 against 1.54 for olive oil. It carries a tariff code of its own (0406 90 32) and a name that is legally exclusive, following judgment C-159/20 of the Court of Justice of the Union. The same Italian market pays €7.76 for feta and €4.73 for olive oil: the same exporting country, the same year, the same market. What the comparison shows with certainty is the difference in dispersion, not its cause.

The same diagnosis holds for table olives: exports of €750.2 million in 2025, €4.25 per kilo in the United States and barely €2.14 in Italy. On a measurement base of its own, €796 million of exports in 2024, the exporters' industry association (PEMETE) also gives the form of supply: roughly 30% packaged, roughly 30% in small packs for food service and the remainder in bulk, in 150-kilo drums. Unit value is not a price index; it is, however, consistent with bulk supply, which here the association itself confirms. The stock exists: 121 Greek PDOs and PGIs, an organic area of 17.2% against 10.5% in the EU. For agricultural products and foodstuffs, legal protection is associated on average with a value ratio of 1.5 against a comparable uncertified product, and above 2.5 in categories this report does not cover: a premium of the order of fifty per cent, not a doubling.

4. Targeting: Germany the principal market, France the secondary — Italy, a flow to be upgraded

Germany (22 points in the matrix of five criteria, scale 1 to 5) is the principal target market: the largest EU import market for the basket, with a Greek share of 1.96% across the sixteen classes, where what matters is upgrading the value of a flow that already exists — from feta towards the other cheeses, from bulk towards packed olive oil. France (20 points, top marks on headroom and unit value) is the secondary one, with a share

of 0.84%: it pays €8.26 per kilo for feta, and Greek feta exports there more than quadrupled, from €20.0 million to €90.0 million (2019–2025). Italy (17 points, the lowest on headroom and unit value) is not a market to be won: the highest Greek share of any market, 7.46%, records dependence — and in the eight classes of primary advantage, where it reaches 12.74%, that dependence is stronger still.

The mode of entry follows the size: for a unit with a median turnover of the order of one million euro the first step is an importer-distributor of national products, aiming at specialist retail and quality food service; organised retail, which controls 44.8%–54.0% of the value depending on the category (D&B Hoovers, retail value) and requires IFS or BRCGS, comes as a second or third stage, while private label is acceptable only as a line that funds the branded one. The regulatory threshold is a condition of access to the shelf: three successive waves of compliance within eighteen months, for packaging, for environmental claims and for due diligence on cocoa and coffee (Measure 2 of section 6) and, within the Union, an extended producer responsibility registration number that the buyer checks. The first application of the targeting is CIBUS TEC 2026 in Parma, the only trade-fair participation planned in this report, where ASDA exhibits with a booth of its own: a technology fair, not a product one — the deficit lies in packing and packaging — and the place is not the same as the target market. Section 3 measures what is at stake; the targeting adds the direction: from the Italian flow towards the German one.

5. Skills: the gap is not one of infrastructure — seven bundles with a deliverable

Greek food manufacturing generates value added of €30.1 thousand per person employed against €57.4 thousand in the European Union (Eurostat), while the technologies of the field are available and largely mature: the gap is one of skills, not of infrastructure. Training bundles B1 to B7 do not repeat the material of the Project's platform (business4extroversion.gr) but presuppose it, specialising it for food and for the data of each unit. The criterion is the deliverable, not the hours: a checked label for one target market (B1), a buyer pack in a foreign language (B5). B1 and B2 address every interested unit; B3 to B7 only those that commit to an export objective and to the joint trade-fair presence, which itself requires B1, B2 and B5. At the ASDA booth one or two of the four units in scope that carry the exporter flag pass on their export experience to the smaller ones.

6. The six policy measures: three start with no precondition and regardless of how the market develops

Measure	Horizon	Indicator of success
1. Certification upgrade and export readiness	Months 1–24	Units in scope with an active organic certification
2. Shared infrastructure for regulatory compliance	Months 1–12	Share of participating units with a complete file under Table C.4, half-yearly
3. Making use of the Internationalisation Observatory	Months 1–3 and continuous	Documented selection of target markets per participating unit in scope
4. Joint trade-fair presence	Months 6–18 — CIBUS TEC 2026, Parma	First application: documented investment decisions and recorded contacts per unit; thereafter, buyer repeat business
5. Raising unit value through a branded proposition	Months 9–30	Change in unit value per unit with a branded line, together with the two indices of the basket
6. Combined use of sectoral instruments	Months 1–6 and continuous	Units in scope combining a sectoral instrument with an ITI resource

The measures intervene where the cost is fixed per business: uneconomic alone, efficient together. Measure 6 requires no additional resources, only coordination. Where the decision is a business one, the measures are confined to information: certification remains the decision and the expense of the business.

Under Table E.1, Measures 2, 3 and 6 keep their value in all or almost all scenarios and are implemented first. The other three can be escalated, on their own starting conditions under Table E.2, as the early indicators of Table B.10 — the PDO/PGI premium, private label, Italy's share of olive oil — clarify the environment; the scenarios are qualitative, they carry no probabilities and they are monitored by product category. The single “Weak” in the matrix concerns Measure 1 in the return-to-price scenario; which is why certification presupposes a documented target market before the spending. Bodies responsible (Table E.2): the businesses for Measures 1, 3 and 5; the ASDA support structure for 2 and 6; the Project Team for 4.

7. Indicative three-year targets — orders of magnitude, not commitments

Metric	Baseline	Indicative three-year target
Units flagged as exporters	4 of 20 (20.0%), 2023	8 of 20 (40.0%) — 4 new ones
Certified units	2 of 20 organic; 0 PDO/PGI, 2023	5 to 8
Turnover of the scope	€60.1 million, 2023	€84 million — the average annual rate of the base 2020–2023, 12.0%, a period in which the extraction itself also widened
Export unit value of units with a branded line	Measured when branded supply begins	A positive change
Buyer repeat business	Not measured	50% of those who place a first order repeat it within twelve months

The certification target concerns the organic route only, for the territorial reason set out in section 2. The fourth target is deliberately left without a number: export value, export participation and turnover can all improve while unit value falls.

8. The principal risk and the answer: the composition of the growth

The risk lies in the composition of the growth. Over the six years the volume of honey rose 115.1% with an average unit value of –1.1%, and that of bakery products 107.6% with 23.5%: kilos, not euro per kilo. That is the road to the “bulk-flow trap” scenario (Table B.10).

The answer is built into the design: Measure 2 produces collectively the compliance infrastructure that each unit pays for separately; Measures 3 and 5 turn the choice of market towards the dearer destinations and supply towards the packed, branded form. It is judged on the unit value index of the national basket, never without the volume index: an average unit value index of 137.3 and a volume index of 161.7 in 2025, base 2019.

Source: ASDA, “Enhanced Special Internationalisation Report — Branded and certified foods”, current edition (August 2026). Measurement bases are not additive: market sizes and channel structure in USD retail value (D&B Hoovers); exports, imports, shares and unit values in EUR customs value of trade (Eurostat–Comext); local figures in EUR company turnover; value added per person employed in EUR (Eurostat, structural business statistics). Unit value is not a price index: at class level it is affected by the composition of the mix as well, and it is consistent with bulk supply without proving it. Documentation for each figure: chapters 3–6 and Annexes A–C; the four-digit class of the KAD 10 units from GEMI (Annex A.7).

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