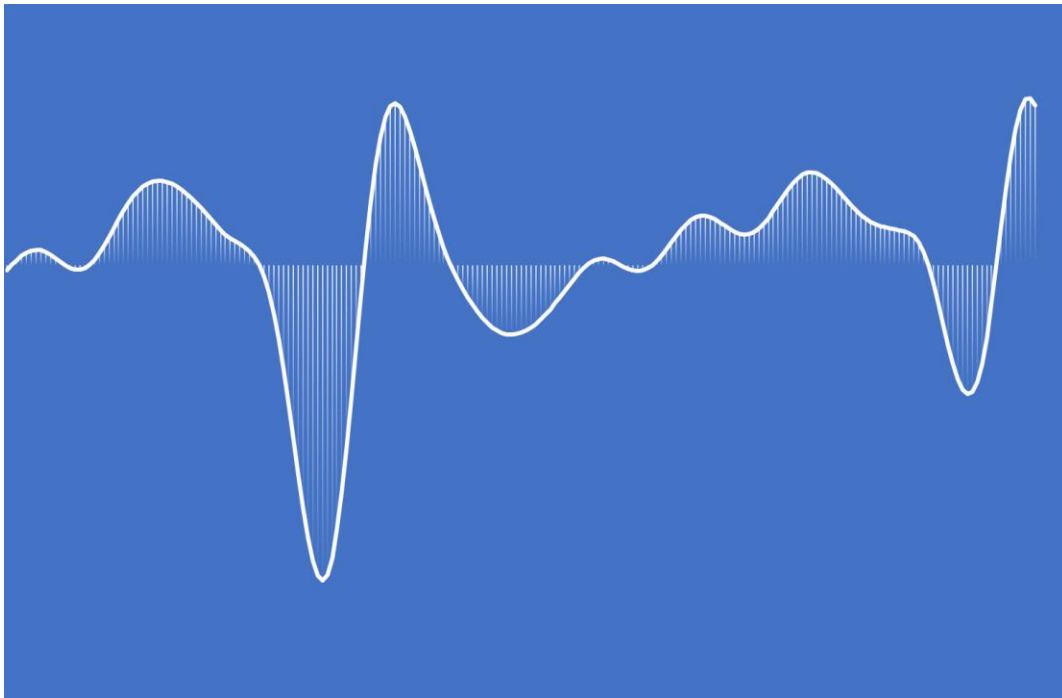


Economic performance of IPR indicators September 2021 update



ECONOMIC PERFORMANCE OF IPR INDICATORS SEPTEMBER 2021 UPDATE

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In May 2021 the EUIPO presented the [Economic impact of COVID-19 crisis in IPR-intensive industries](#) with data until December 2020, including indicators for all intellectual property rights (IPR), trade marks (TM), designs (DES), patents (PT) and copyright (CR).

The Observatory updates IPR indicators quarterly to monitor the recovery phase during 2021 and beyond for the European Union (EU) and for the four largest Member States (MS). So far, two updates have been published in June and September 2021 with data until March and June 2021 respectively, and now the Observatory presents results for the third quarter of 2021.

EU indicators

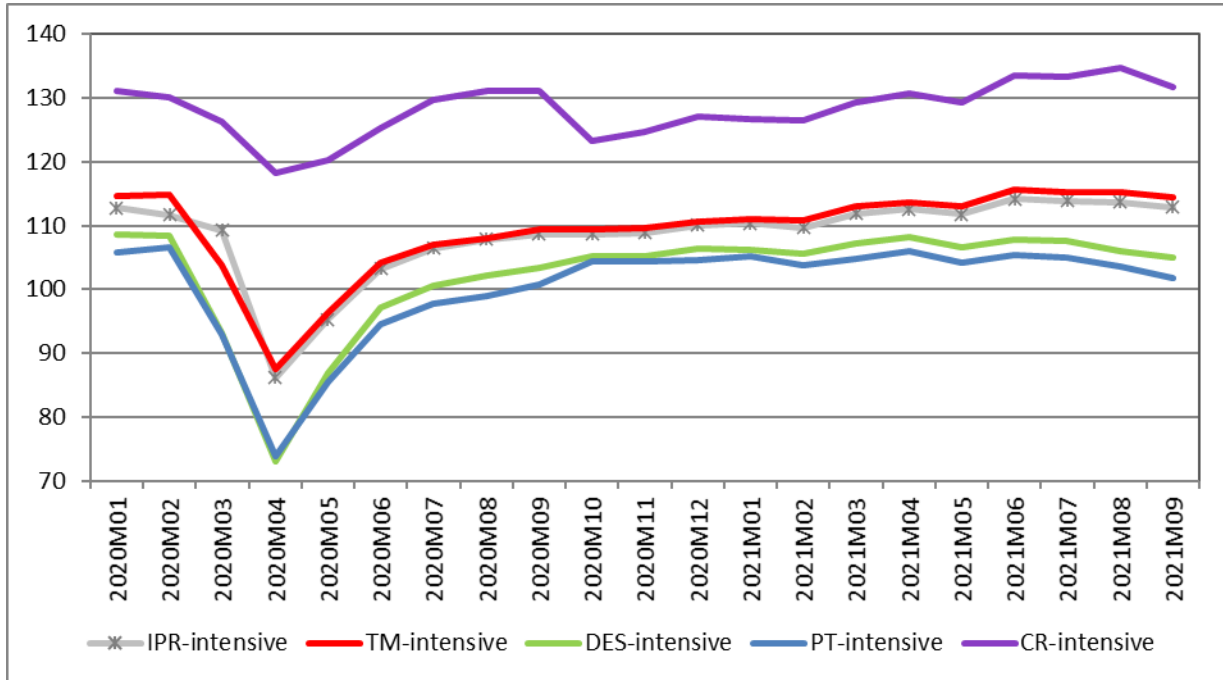
In September 2021 trade mark, design and patent indicators in the EU were below the levels recorded in February 2020, while the copyright indicator and the indicator for all IPRs were one point above their pre-crisis levels. Compared with the levels in June 2021, all indicators were at lower levels, with the largest decrease in the third quarter of the year in the patent indicator.

As a result, the copyright indicator and the indicator for all IPRs were 1 point above their pre-crisis levels, the trade mark indicator was 0.4 points below, the design indicator was 3 points below and the patent indicator was almost 5 points below the level reached before the crisis.

The different composition of each IPR indicator is reflected in its trend, with patent- and design-intensive industries more affected by the sharp decline in 2020 but also faster recovery in manufacturing industries in the first half of 2021 and a slowing down of its annual rates in the third quarter of 2021. This could be partially explained by the global chip shortage and other supply chain problems affecting vehicle production across Europe, which was reflected in negative annual rates in design-intensive industries in September 2021.

All indicators showed a lower level in September 2021 compared with August 2021.

Figure 1: Indicators of IPR-intensive industries in the EU (2020 and 2021), base 2015 = 100.



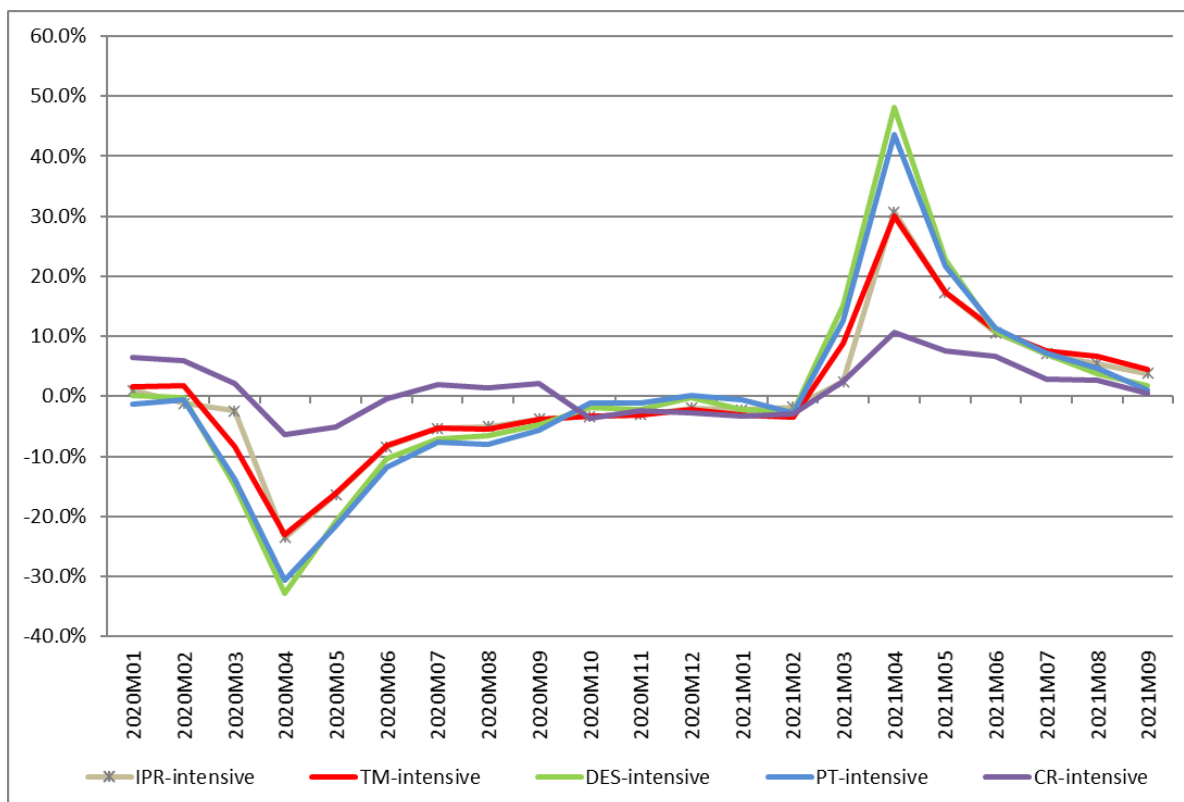
Annual rates compare the value of the indicator in each month with the same month of the previous year.

Figure 2 shows the symmetric behaviour of the annual rates of the indicators: the highest the trough in April 2020, the highest the peak in April 2021. All the IPR indicators showed 7 months of positive annual rates, with accumulated rates in the first three quarters of the year ranging from 3 % in the copyright indicator to 10 % in the design and patent indicators.

Annual rates in the 3 months of the third quarter show a slowing down process more remarkable in design- and patent-intensive industries.

Nevertheless, more time is needed to cancel out the long year of negative growth. Since the beginning of 2020, IPR-, design- and patent-intensive industries have registered 13 months of consecutive negative annual rates. Trade mark-intensive industries accumulated 12 months of negative annual rates and copyright-intensive industries – while more volatile – still registered 8 negative rates in the 21 months since January 2020.

Figure 2: Annual rates of change (%) of IPR indicators in the EU.



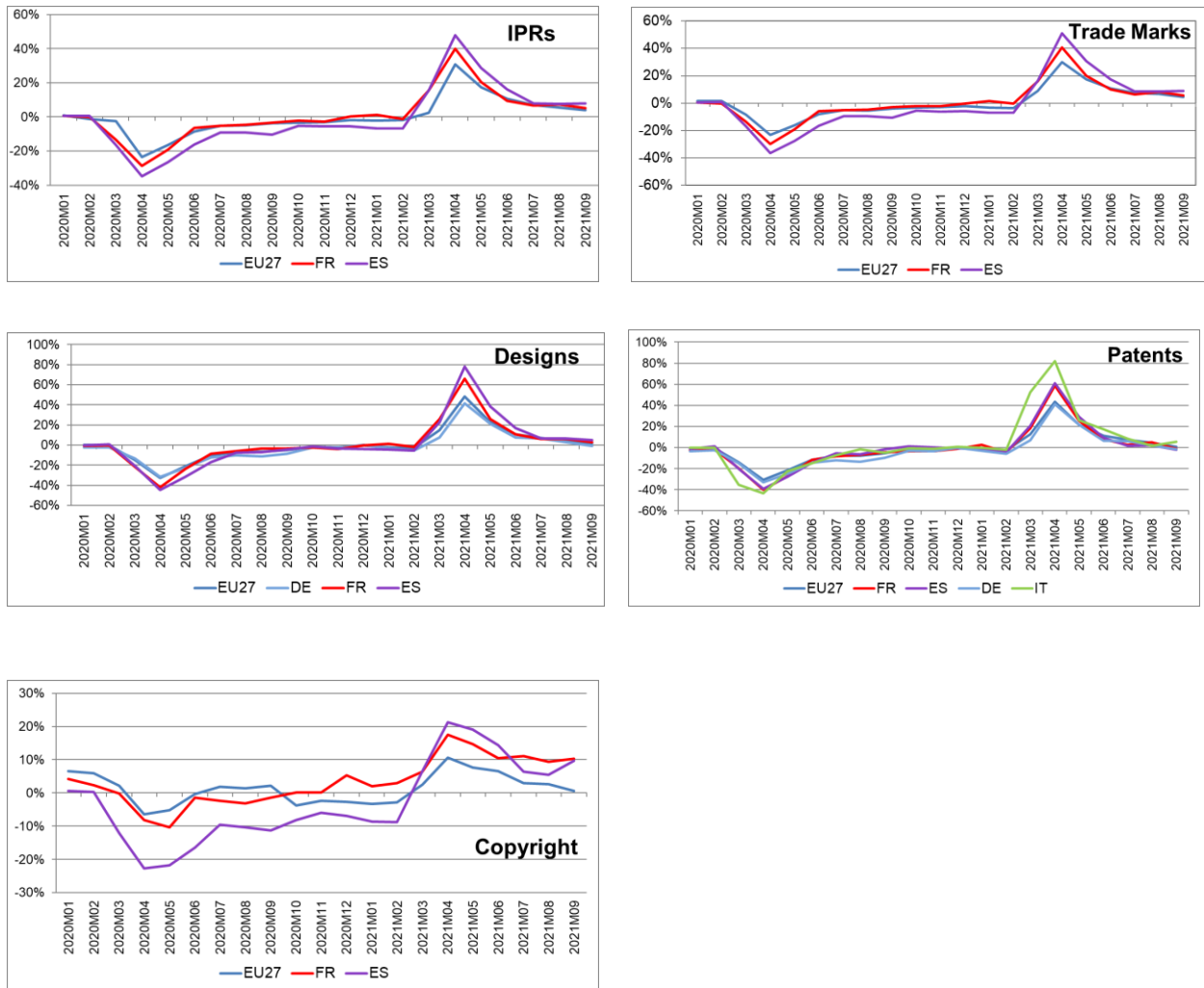
Results at Member State level

The performance of IPR-intensive industries in the four largest EU Member States shows a similar trend to the EU average but with different magnitudes in their growth rates.

The indicators for all IPR-, trade mark- and copyright-intensive industries were only available for France and Spain, due to data availability issues. Design indicators were estimated for Germany, France and Spain and patent indicators were estimated for the four largest EU Member States.

As was the case with the EU indicators, the higher the decline in March-April 2020, the higher the growth rates in the same months of 2021.

Figures 3 to 7: Annual rates of change (%) of IPR indicators in the four largest EU Member States.



The French and Spanish indicators registered average annual rates of above 10 % in the first three quarters of 2021. However, copyright registered an annual rate of 9 % in France and 6 % in Spain.

Spanish manufacturing industries performed better in 2020, while the wholesale and service sectors showed poorer performance (higher decline) due to their dependence on tourism-related activities. Nevertheless, since March 2021 the copyright-intensive industries have registered very good rates, with 6 % average growth in the first three quarters of the year. However, this is still half the growth rate of the design-intensive industries (14 %) and lower average rates than all IPR-, trade mark- and patent-intensive industries (which were between 10 % and 12 %). As a result, all Spanish indicators were still below pre-crisis levels: about 1 point below in the IPR, trade

mark and design indicators and 2 points below in the copyright indicator. The patent indicator has registered low growth rates in July and August and a negative annual rate in September, and it remains 6 points below the level recorded in February 2020.

All the **French** indicators except the patent indicator reached their pre-crisis levels in September 2021. The design indicator was at its pre-crisis level; the all IPR indicator was 2.4 points above that level; the trade mark indicator was 3.4 points above the pre-crisis level and the copyright indicator was 11 points above that level recorded in February 2020 after 12 consecutive months with positive annual rates. This is explained by the resilience shown by some French IPR-intensive industries in the service sector, such as ‘Information service activities’, ‘Computer programming and consultancy’ and ‘Other professional, scientific and technical activities’.

The patent indicator registered very high growth rates in the second quarter of 2021 but its rates slowed down in the third quarter, with a negative annual rate in September putting it 5 points below its pre-crisis level.

German indicators for design- and patent-intensive industries showed the lowest decreases in April 2020 but both indicators also registered the lowest growth rates in the first 9 months of 2021. As a consequence, the indicators were still 9 and 11 points below their pre-crisis levels respectively, with especially bad performances in August and September and both indicators’ values falling below 100. The performance of NACE class 2910 ‘Manufacture of motor vehicles’, which has the highest weighting in the patent-intensive industries (>10 %), has been striking and in September 2021 reached a value of 40 (base 100 in 2015) with an annual decrease close to 40 %.

Patent indicators were calculated for the four largest EU countries, with the **Italian** patent indicator reaching its pre-crisis level in March 2021, and it remained stable in the third quarter of 2021. It showed an average growth rate of 17 % in the first three quarters of 2021, the highest rate of all the indicators estimated for the EU and the four largest MS. It was also the only patent indicator with a positive annual rate in September 2021.

IPR indicators: difference to pre-crisis levels

September 2021

	EU	Germany	France	Italy	Spain
IPR	+1.2		+2.4		-1.4
TM	-0.4		+3.4		-1.1
DES	-3.3	-9.4	+0.0		-0.8
PT	-4.8	-11.4	-5.4	+0.0	-6.0
CR	+1.6		+10.9		-2.1

The table shows the difference between the IPR indicators values in September 2021 and February 2020, with red numbers showing indicators that were still below pre-crisis levels and green numbers indicating that the indicator reached or surpassed its pre-crisis level.

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