

Economic performance of IPR indicators June 2022 update



ECONOMIC PERFORMANCE OF IPR INDICATORS JUNE 2022 UPDATE

ISBN 978-92-9156-327-2 TB-09-22-489-EN-N DOI 10.2814/41188

© European Union Intellectual Property Office, 2022

Reproduction is authorised provided the source is acknowledged

In May 2021 the EUIPO presented the [Economic impact of COVID-19 crisis in IPR-intensive industries](#) with data until December 2020, including indicators¹ for all intellectual property rights (IPR), trade marks (TM), designs (DES), patents (PT) and copyright (CR).

The Observatory updates IPR indicators quarterly to monitor their economic development, for the European Union (EU) and for the four largest Member States (MS). Until now, five updates have been published with data until March 2022 and now the EUIPO presents results until the first semester of 2022.

EU indicators

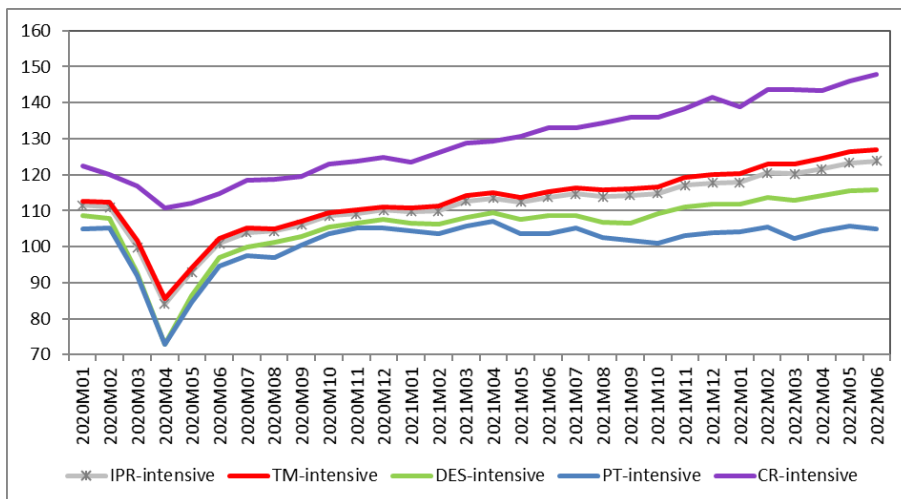
In June 2022, the patent indicator in the EU continues practically at the same level recorded in February 2020 after one year and a half stable slightly below its pre-crisis level. Other IPR indicators were clearly above their pre-crisis level, showing significant increases in the second quarter of 2022.

The copyright indicator was 28 points above its pre-crisis level, the trade mark and all IPRs indicators were 15 and 13 points above respectively and the design indicator was 8 points above the level reached before the COVID-19 crisis.

The five EU indicators attained a higher level in June compared to March. The overall IPR indicator was up by 3.5 points, with copyright and trade mark indicators increasing by 4 points in the second quarter of 2022; design and patent indicators rose by almost 3 points in the same period.

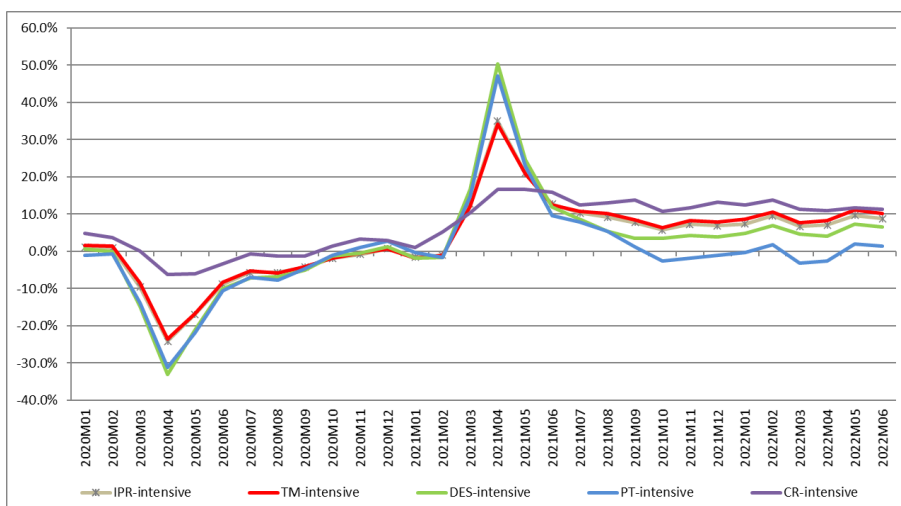
¹ IPR indicators are based on monthly Eurostat's Short-Term Statistics (STS) covering all sectors of the economy and on previous research of the EUIPO and the European Patent Office (EPO). They monitor the economic performance of industries that use IPRs more intensively than the rest of the economy.

Figure 1: Indicators of IPR-intensive industries in the EU, 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 deepest trough in April 2020, the highest peak in April 2021. The average growth rate in the second quarter of 2022 is higher than the average growth rate in the previous quarter for all indicators except the copyright indicator. All indicators, except patent-intensive industries, have registered positive rates at least for the last 15 months.

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



The different sector composition of each IPR indicator is reflected in their trend, with patent- and design-intensive industries being more affected by the sharp decline in 2020 (with a trough in April of -30 %) but also faster recovery in manufacturing industries in the first half of 2021 (the peak in April of both indicators was +50 % compared with the same month of the previous year). The patent indicator returned to positive growth rates in May and June, although more time is needed to confirm the recovery. Patent-intensive industries have been affected by several issues, such as global chip shortages and other supply chain problems. These industries could also be affected by the increasing cost of energy during the rest of 2022 and beyond.

Design-intensive industries registered a growth in annual rates above 5 % after the peak in April 2021, and an average rate in the second quarter of 2022 of 6 %. This is the result of a standstill in manufacturing, counterbalanced by a 20 % increase in wholesale trade in design-intensive industries and a 10 % increase in the service sector.

The total IPR and trade mark indicators registered annual rates close to 10 %, also explained by a 20 % average growth rate in the wholesale trade industries and 16 % in the service sector trade mark-intensive industries. The NACE division 79 'Travel agency, tour operator and other reservation service and related activities' is intensive only in trade marks and reached four times the 2021 value in the second quarter of 2022, after two years with extremely low values during the pandemic.

Finally, copyright-intensive industries showed the highest annual rates of all the indicators since the peak in April 2021 with annual growth rates above 10 % during 2021 and the first half of 2022. Among copyright-intensive industries, NACE division 59 'Motion picture, video and television programme production, sound recording and music publishing activities' showed the best performance in the second quarter of 2022, with a 30 % average annual rate.

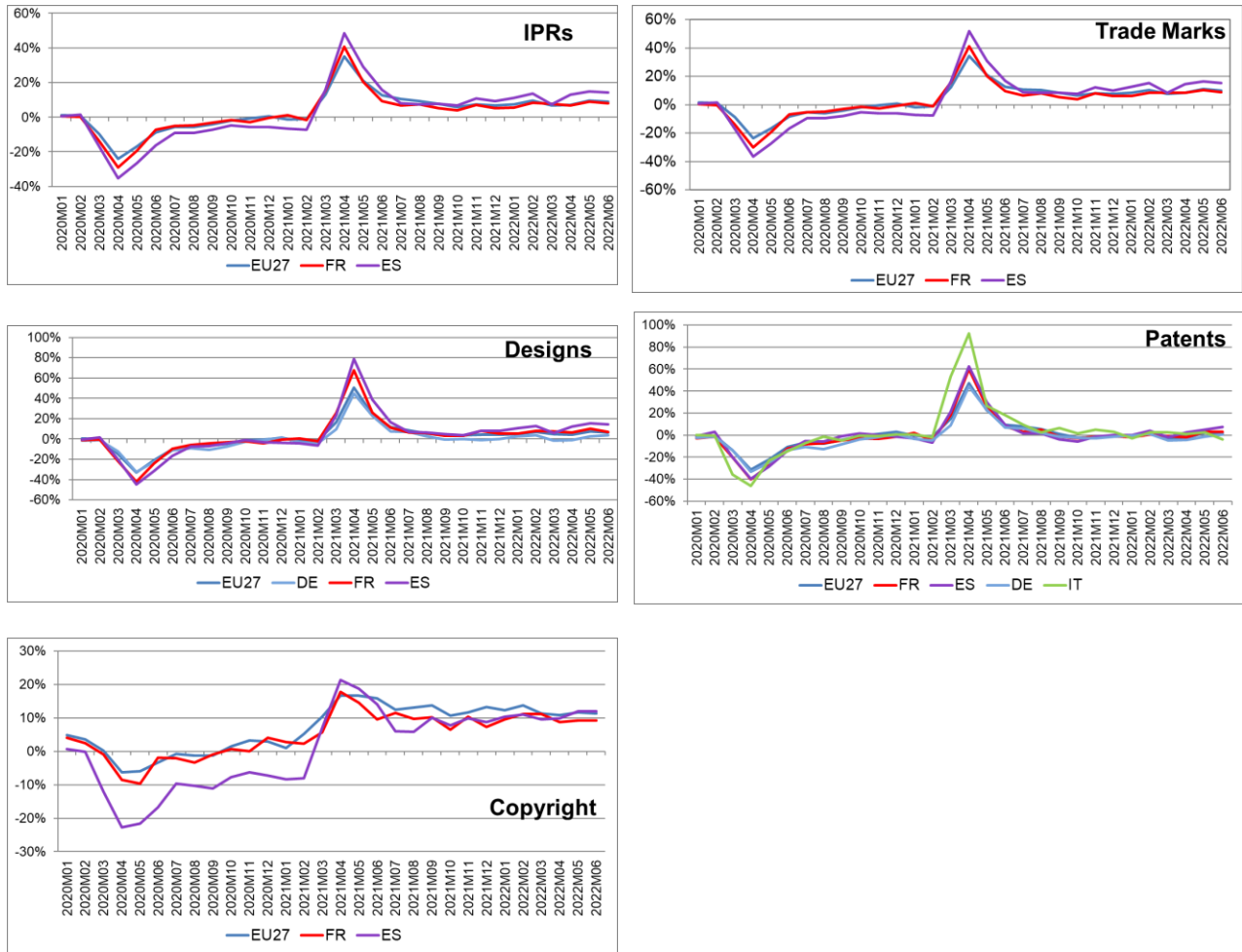
Results at Member State level

The performance of IPR-intensive industries in the four largest EU Member States shows different trends, which is explained by the different structures of their IPR-intensive industries.

In a quarter with the service sector as the driver for growth of IPR-intensive industries, Spain registered the highest annual rates for all IPR indicators, with all annual rates above 10 % except for patent-intensive industries that registered a 5 % annual average rate.

The indicators for overall IPR-, trade mark- and copyright-intensive industries were only calculated 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.

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



The Spanish indicators are all above the pre-crisis level and the French indicators show similar relative levels in trade mark- and IPR-intensive industries, with a better situation in copyright-intensive industries and worse in design and patent indicators.

Spanish manufacturing industries performed better than in other MS in the second quarter of 2022 with an acceleration of annual rates in the month of June. The wholesale sector registered an average growth rate above 30 %, including an annual rate of 60 % in NACE group 46.7 ‘Other

specialised wholesale' that includes wholesale activities of intermediate products, except agricultural, typically not for household use, which is design-intensive. Finally, service sector IPR-intensive industries in Spain registered similar rates as in the EU, but due to the higher dependence on tourism-related activities, the extraordinary performance of NACE division 79 (although still 5 points below its pre-crisis level) increases copyright-intensive industries growth rates.

As a result of the different weights of the three big sectors in the IPR indicators, patent-intensive industries in Spain are at their pre-crisis level; copyright-intensive industries are 9 points above the level in February 2020 and trade mark-, design- and IPR-intensive industries are more than 10 points above their pre-crisis level.

All the **French** indicators except patents were well above their pre-crisis levels in June 2022, with growth rates very close to the EU average. The copyright indicator was 20 points above the level recorded in February 2020, reflecting the resilience shown during 2020 and 2021 by French IPR-intensive industries in the service sector.

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 2021 and the first half of 2022.

As a consequence, both indicators were still below their pre-crisis levels, with the patent indicator still 6.5 points below the level in February 2020. The performance of NACE class 2910 'Manufacture of motor vehicles', which has the highest weighting in the German patent-intensive industries (>10 %), has been striking. After the collapse of motor vehicle production in March 2020, only the last quarter of that year showed a recovery close to normal levels. A new decline in 2021, explained by supply chain problems, prevented the industry from reaching values above 60 % of pre-crisis production that influences auxiliary industries in Germany and other MS.

Patent indicators were calculated for the four largest EU countries, with the **Italian** patent indicator reaching its pre-crisis level in March 2021. It was quite stable for the rest of the period, except January and June 2022, when it registered small negative rates that took it almost two points below the pre-crisis level at the end of the second quarter of 2022.

IPR indicators: difference to pre-crisis levels

June 2022

	EU	Germany	France	Italy	Spain
IPR	+12.7		+10.4		+11.5
TM	+14.6		+12.1		+13.2
DES	+7.8	-0.5	+8.2		+12.8
PT	-0.3	-6.5	-2.6	-1.8	+0.3
CR	+28.0		+19.8		+8.9

The table shows the difference between the IPR indicators values in June 2022 and February 2020, with red numbers showing indicators that are still below pre-crisis levels and green numbers indicating where the indicator has reached or surpassed its pre-crisis level.