

ambiente

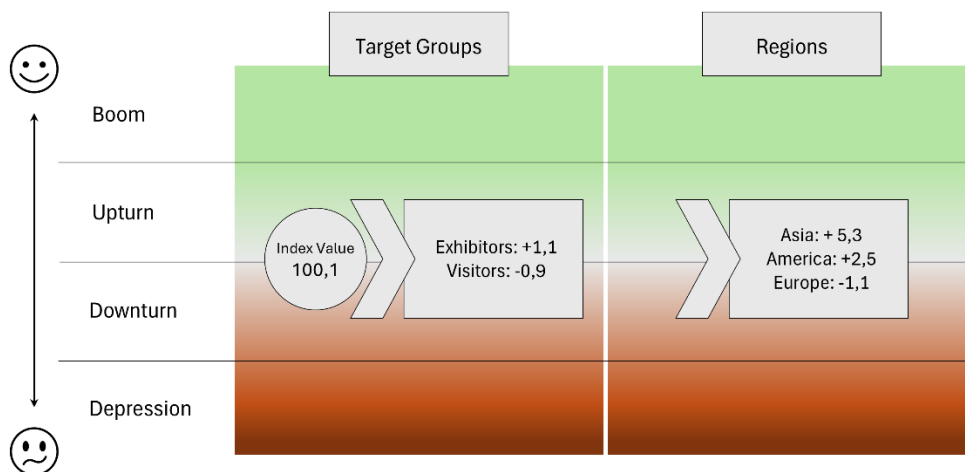
christmasworld

creativeworld

## New global industry index for consumer goods segments shows: US companies feel most affected by tariffs

Frankfurt am Main/Köln, February 2026. With the launch of the new Industry Index, IFH KÖLN and Messe Frankfurt are presenting an international sentiment barometer for trade-fair-relevant consumer goods segments for the first time. The results of the inaugural survey reveal a mixed overall mood. Political uncertainty, pricing pressure and weak growth momentum are posing challenges for companies worldwide. While Asia and the USA are looking ahead with comparatively greater dynamism, Europe is adopting a more cautious stance. Overall, respondents rate their own business situation more positively than that of the entire industry. Across all regions, there is a clear call for less regulation.

### The global business climate is mixed



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**Composition of the Index:** A total of 8 items on the (current/future) situation of the industry and your own company are included in the index  
**Calculation of the Index:**  $100 + \text{sum}(Q1.a \text{ mean index values} + \dots + Q2.e/f/g \text{ mean index values})$

The new IFH Industry Index reflects the current sentiment in the global consumer goods industry. Photo: IFH KÖLN

With the new Industry Index, IFH KÖLN and Messe Frankfurt are jointly introducing an international sentiment and trend barometer for companies in trade-fair-relevant consumer goods sectors. The aim is to identify market sentiment, developments and trends at an early stage and provide companies with a sound basis for strategic decision-making. For the first round of surveys, 945 exhibitors and visitors at Messe Frankfurt from more than 60 countries – including Germany, Belgium, China and the USA – were surveyed. The results point to an overall mixed sentiment: with an index score of 100.1, the mood remains stable but subdued. Europe, with a score of 98.9, is slightly below the international average, while the USA (102.5) and Asia (105.3) record higher values.

### **Political intervention and trade conflicts are key pressure factors**

Political frameworks, trade debates and regulatory interventions are also having a noticeable impact on sentiment in trade-fair-relevant consumer goods segments. Almost one in two exhibitors (47%) and visitors (46%) expect political measures to have a negative impact on their own business. Tariffs and trade restrictions are a particularly significant factor: around half of exhibitors (49%) report being directly affected – most notably in the USA (75%), followed by Asia (58%) and Europe (33%). At the same time, 44% of exhibitors and 38% of visitors say they feel only partially prepared for potential changes in tariffs and import restrictions.

„The framework conditions remain challenging – this is clearly reflected in the Industry Index. At the same time, companies are sending encouraging signals when it comes to their own business development. The strong interest in our leading trade fairs Ambiente, Christmasworld and Creativeworld underlines this confidence. The industry's desire is clear: reliable framework conditions and greater entrepreneurial freedom instead of additional regulation,” says Detlef Braun, Member of the Executive Board of Messe Frankfurt.

### **Own business development viewed more positively than the industry as a whole**

Looking ahead to the next six months, respondents expect only limited improvement in the overall situation within their consumer goods sectors. Among exhibitors, just under three in ten (28%) anticipate a positive development, while almost half (49%) expect conditions to deteriorate. However, perceptions are more optimistic when companies assess their own business: 42% of exhibitors expect an improvement or at least stability in their own business situation. Among visitors, 27% anticipate positive development, while 47% expect business to remain stable. This pattern – greater confidence in one's own company than in the sector overall – is also evident at European level.

“Many consumer goods segments are currently under considerable pressure: intense price competition and shrinking margins are affecting companies just as much as ongoing geopolitical uncertainty and rising production costs. This combination makes one thing clear: companies must act now. Those who further develop their business models, make their value chains more resilient and no longer postpone necessary strategic adjustments will be far better equipped to navigate this challenging phase,” explains Dr Ralf Deckers, Head of Strategic Insights & Analytics at IFH KÖLN.

## **Global consumer goods markets are growing – dynamics vary by region**

Growth rates also reflect the cautious sentiment. Total consumer spending, including public and corporate expenditure, is growing by 1.7% in Europe, compared with 3.0% in the USA and 3.7% in Asia. Private consumption growth remains particularly subdued in Europe at just 0.4%, while the USA records 2.7% and Asia 4.6%. The global turnover volume of the consumer goods segments analysed amounts to approximately €946 billion.

## **About the Industry Index**

For the first round of surveys of the Industry Index by IFH KÖLN and Messe Frankfurt, a total of 945 exhibitors and visitors to Messe Frankfurt from more than 60 countries were surveyed between December 2025 and January 2026. On the exhibitor side, 61% represented industry and 39% wholesale. Among visitors, 73% came from retail, while 27% were classified as service providers. The objective of the Industry Index is to identify relevant developments, sentiment and trends in the consumer goods segments of Ambiente, Christmasworld and Creativeworld at an early stage and to provide companies with a data-based foundation for strategic decision-making.

Consumer goods segments covered include, among others: Tableware and household goods, small electrical appliances, residential lighting, small furniture, garden furnishings and decoration, stationery and office supplies, leather goods and accessories, arts and crafts, painting and drawing, graffiti and street art, needlework and textile crafts, Christmas decorations, candles, arrangements, wreaths, artificial and dried flowers, and festive items.

The Industry Index can be downloaded [here](#).

## **Note for journalists**

Further up-to-date news, expert knowledge and ideas for retail can be found on [Conzoom Solutions](#). With the [Conzoom Circle](#) network, Messe Frankfurt connects the world's most important platforms for the global consumer goods and retail industry and bundles industry knowledge and expertise online.

## **About IFH KÖLN**

As an industry insider, IFH KÖLN provides information, market research and consulting on trade-related issues, focusing on the successful shaping of the future and the development of viable business models. IFH KÖLN is the leading point of contact for independent, robust data, analyses and strategies that help companies and retail locations remain competitive and future-proof. By analysing markets, customers and competition, IFH KÖLN offers a 360-degree perspective for strategic decision-making in trade-related topics. Through tailored projects, clients are supported in strategic issues such as digital strategies, the development of new markets and target groups, and excellence across sales channels. With its subsidiary brand ECC KÖLN, IFH KÖLN has been active in e-commerce since 1999 and focuses on community building and knowledge transfer for digitalisation in retail.

More at: [www.ifhkoeln.de](http://www.ifhkoeln.de)

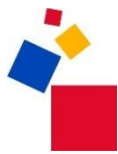
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