

ambiente

christmasworld

creativeworld

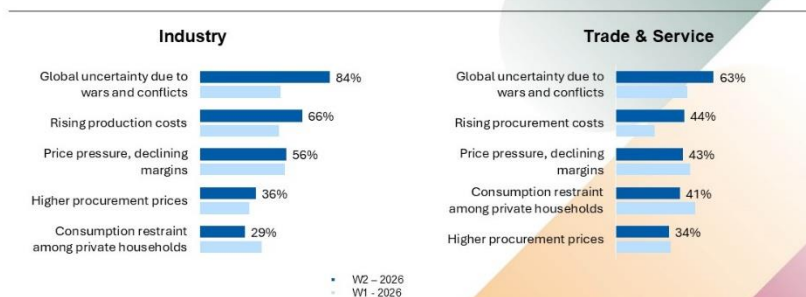
Latest Industry Index: Global uncertainties are placing an increasing burden on businesses

Frankfurt am Main/Köln, September 2026. The second round of the Industry Index survey conducted by IFH KÖLN and Messe Frankfurt shows that, whilst the global business climate has remained largely unchanged overall compared with the first round and remains at a subdued level, the factors causing pressure have shifted significantly. In particular, global uncertainties, rising production and procurement costs, as well as tariffs and trade restrictions, are putting companies under increasing pressure.

The global industry index compiled by IFH KÖLN and Messe Frankfurt serves as an international sentiment barometer, highlighting developments in trade fair-related sectors at an early stage. A total of 667 representatives from Industry and Trade & Service around the world took part in the second survey wave in June and July 2026. With an index score of 100.4, compared with 100.1 in the first survey wave, the global business climate remains virtually unchanged and subdued overall. The Industry is slightly more confident than Trade & Service. There are also regional differences: Asia is 4.2 index points above the overall index and America 2.3 points above it, while Europe is 1.2 points below. “The economy is currently less in recovery mode than under pressure to reposition itself. Sentiment is stabilising in some areas, but at the same time the pressures are shifting away from weak demand towards geopolitical uncertainty, rising costs and trade barriers,” says Dr Ralf Deckers, Head of Strategic Insights & Analytics at IFH KÖLN.

Global uncertainties and rising costs are increasingly affecting business.

Top 5 Challenges



Q8.a: What are the biggest challenges for your company in the current situation?

The industry index shows how the key challenges facing the consumer goods sector are evolving.
Graphic: IFH KÖLN.

Costs and geopolitical crises move to centre stage

A comparison of the two survey rounds illustrates particularly clearly how the challenges

facing businesses are shifting. In the manufacturing sector, 84 per cent now cite global uncertainty caused by wars and conflicts as a key challenge – compared with 52 per cent in the first survey round. At the same time, rising production costs are becoming significantly more important: the proportion citing this has risen from 51 to 66 per cent. Global uncertainty is also rising significantly in the trade and services sector – from 46 per cent to 63 per cent. The second survey round coincided with a period of growing geopolitical tensions. The military conflicts in the Gulf region and the associated risks to key international trade and energy routes highlight just how closely intertwined geopolitical stability, global supply chains and economic planning certainty are. At the same time, rising procurement costs are becoming a more significant factor, whilst consumer reluctance amongst private households is becoming less of a concern compared with the first survey wave. The second survey wave thus shows that companies are increasingly under pressure from both external factors that are difficult to influence and from rising costs.

Political pressures continue to increase

Tariffs and trade restrictions are continuing to put pressure on businesses. Regionally, businesses in America remain the hardest hit: 74 per cent say they are severely or very severely affected. In Asia, the figure now stands at 66 per cent, and in Europe at 42 per cent. By way of comparison: in the first wave of the survey, the corresponding figures were 75 per cent in America, 58 per cent in Asia and 33 per cent in Europe. This means that the pressure is mounting, particularly in Asia and Europe. Despite this trend, companies do not feel significantly better prepared for changes to tariffs and import restrictions. A large proportion still consider themselves only partially prepared.

AI adoption faces structural hurdles

Another challenge is the use of artificial intelligence. AI is currently used primarily for content creation and media-related applications. Its use is already somewhat more advanced in industry than in trade and services. According to the second wave of the survey, the biggest challenges in introducing AI lie primarily in a lack of expertise and in integration into existing systems. Budgetary issues, a lack of resources, as well as data protection and security risks also play a significant role.

Moderate outlook despite challenging conditions

Despite increased geopolitical and economic pressures, companies are not entirely pessimistic about the coming months. The industry sector, in particular, appears more confident about future developments than the trade and services sectors. The slight improvement in turnover also points to the first signs of recovery. Overall, however, expectations remain cautious. “Companies are increasingly adapting to the volatile environment, but there is still no sign of a broad-based upturn,” says Dr Ralf Deckers. Julia Uherek, Vice President Consumer Goods Fairs at Messe Frankfurt, adds: “Against this backdrop, businesses need clear direction, reliable networks and new business contacts more than ever. International platforms such as the Frankfurt consumer goods fairs bring the right partners together for this purpose. We cannot eliminate volatility – but we can support companies in dealing with it more effectively.”

The industry index can be downloaded [here](#).

About the Industry Index

The global Industry Index conducted by IFH COLOGNE and Messe Frankfurt is an international barometer of sentiment and trends for the consumer goods segments relevant to the Ambiente, Christmasworld and Creativeworld trade fairs. The aim is to identify relevant developments, sentiments and trends in the consumer goods segments of Ambiente, Christmasworld and Creativeworld at an early stage and provide companies

with a data-based foundation for strategic decision-making. For the second round of the global Industry Index survey by IFH KÖLN and Messe Frankfurt, 667 companies were surveyed online via Messe Frankfurt's communication channels in June and July 2026. Of these, 258 respondents were from the manufacturing sector and 409 from the trade and services sector. 68 per cent of respondents were from Europe, 20 per cent from Asia, eight per cent from the Americas and two per cent from Africa. The first wave of the survey took place from December 2025 to January 2026.

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

Next trade fair dates:

Ambiente, Christmasworld and Creativeworld will continue to take place at the same time at the Frankfurt exhibition centre.

Ambiente/Christmasworld:	29 January to 2 February 2027
Creativeworld:	29 January to 1 February 2027

Note for journalists:

Discover further news, expert knowledge and ideas for retail on [Conzoom Solutions](#). With the [Conzoom Circle](#) network, Messe Frankfurt links the most important international platforms for the global consumer goods and retail industry and bundles industry knowledge and expertise.

Press releases & Images:

ambiente.messefrankfurt.com/press | christmasworld.messefrankfurt.com/press
creativeworld.messefrankfurt.com/press

On social media:

www.facebook.com/ambientefair | www.instagram.com/ambientefair |
www.linkedin.com/company/ambientefair

www.facebook.com/christmasworld/ | www.instagram.com/christmasworld.frankfurt/
www.linkedin.com/company/christmasworldfrankfurt

www.facebook.com/creativeworld.frankfurt | www.instagram.com/creativeworld.frankfurt/
www.linkedin.com/company/creativeworldfrankfurt

Hashtags:

#ambiente27 #ambientefair
#christmasworld27 #christmasbusiness
#creativeworld27 #creativeindustry



Your contact:

Jelena Brezac
Tel.: +49 69 75 75-6880
jelena.brezac@messefrankfurt.com

Messe Frankfurt Exhibition GmbH
Ludwig-Erhard-Anlage 1
60327 Frankfurt am Main

www.messefrankfurt.com

Background information on Messe

www.messefrankfurt.com/background-information

Background information on Conzoom Circle

conzoom-circle.messefrankfurt.com/information