

TRADE PROMOTION EUROPE

One voice for European trade promotion

European Trade Promotion in Action

The scale, reach and strategic role of the
Trade Promotion Europe network.

Trade Promotion Europe brings together national and regional trade promotion and agrifood promotion organisations that support European businesses, in particular SMEs, to internationalize. The network combines local access, specialised expertise and an international presence across Europe and third-country markets.

34

member organisations

23

European countries

700+

offices and in-market locations

A European network with local access and global reach.

TPE members provide a domestic entry point for companies and connect them with expertise, markets and partners through extensive European and international networks.

34

member organisations

23

European countries represented

8,000+

staff employed by 28 member organisations

700+

offices and in-market locations

Over

150,000

companies supported annually

91%

of companies supported are SMEs

Current membership composition:

24

national TPOs

3

regional TPOs

7

agrifood promotion organisations

Trade-promotion support is designed primarily around SME needs.

CLIENT PROFILE



On average, SMEs account for 91% of responding members' client bases.
The shares are averages across member organisations, not a weighted calculation across every company supported.

HOW MEMBERS ENGAGE WITH COMPANIES

Engagement approach:



80% use criteria

How access is targeted

- 80% of respondents apply eligibility, readiness or service-specific criteria before providing some services.
- Among those applying criteria: 58% require an intention to export; 42% require existing export activity; 26% consider growth potential; 16% use employee or turnover thresholds. Other criteria include national eligibility, legal compliance, sector focus and project maturity.

Interpretation

The network combines broad access with targeted support. Members respond to immediate company needs while also identifying firms with the readiness and potential to grow internationally.

Share of respondents

From first information to market entry, partnerships and international growth.

SERVICES PROVIDED BY MEMBERS



information



readiness



market
intelligence



buyer/partner
connections



missions &
trade fairs



acceleration
& growth

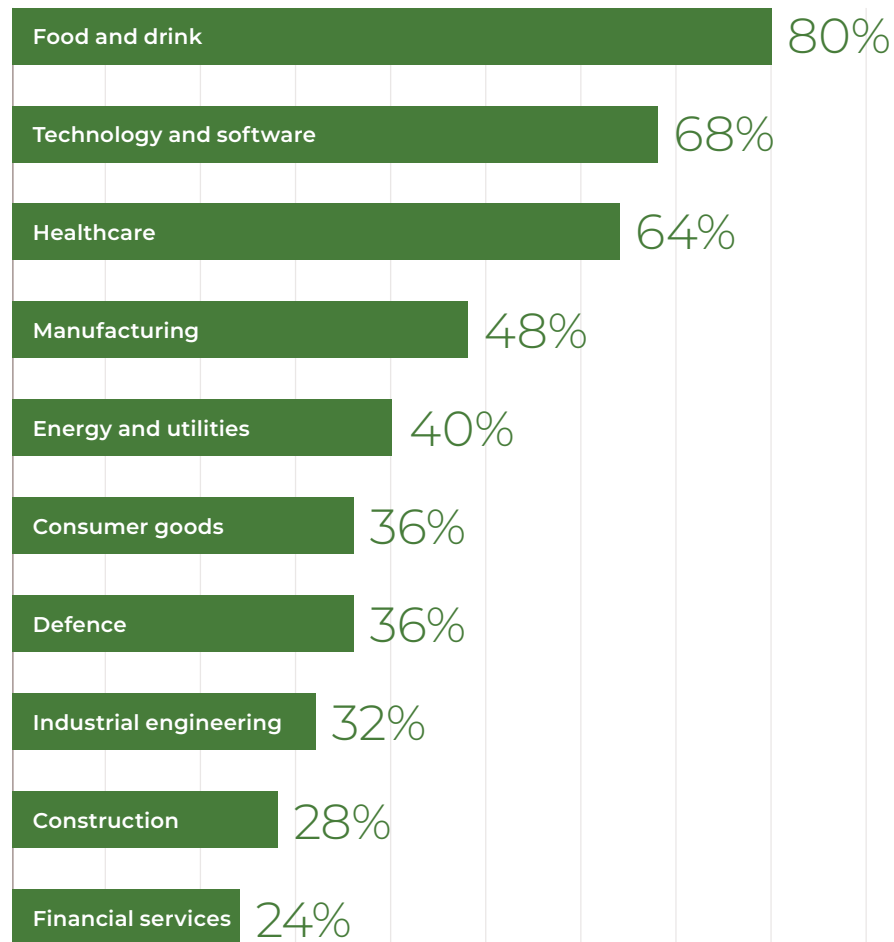
REPORTED REACH BY SERVICE CATEGORY

Broad-access & market-connection services	Client reach
Information provision	223,435
B2B meetings and partner matching	55,272
Trade-show attendance support	19,555
Trade missions	14,595
Tailored & capability-building services	Client reach
Customised market surveys	25,916
E-commerce platform development	18,244
Client training	9,709
Export acceleration programmes	4,169
Business strategy development	4,101
Export-readiness assessments	3,166
Communication campaign development	1,542
Innovation support	1,486

Service volumes are non-additive and may include the same company across more than one service category.

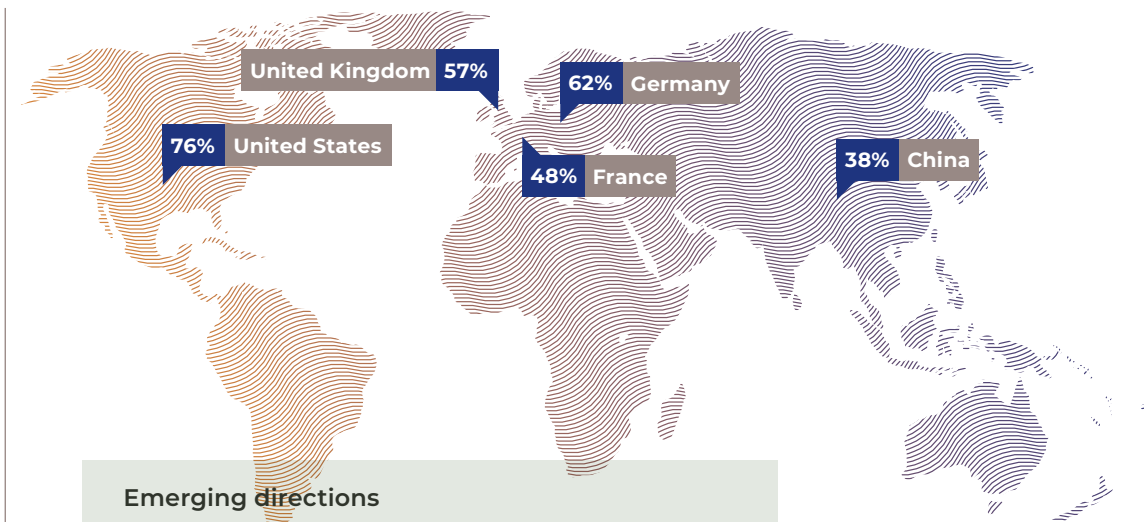
Members strengthen core European trade while opening new routes for resilience and growth.

PRIORITY SECTORS FOR EXPORT DEVELOPMENT



Share of respondents prioritising it

TOP PRIORITY EXPORT MARKETS



Emerging directions

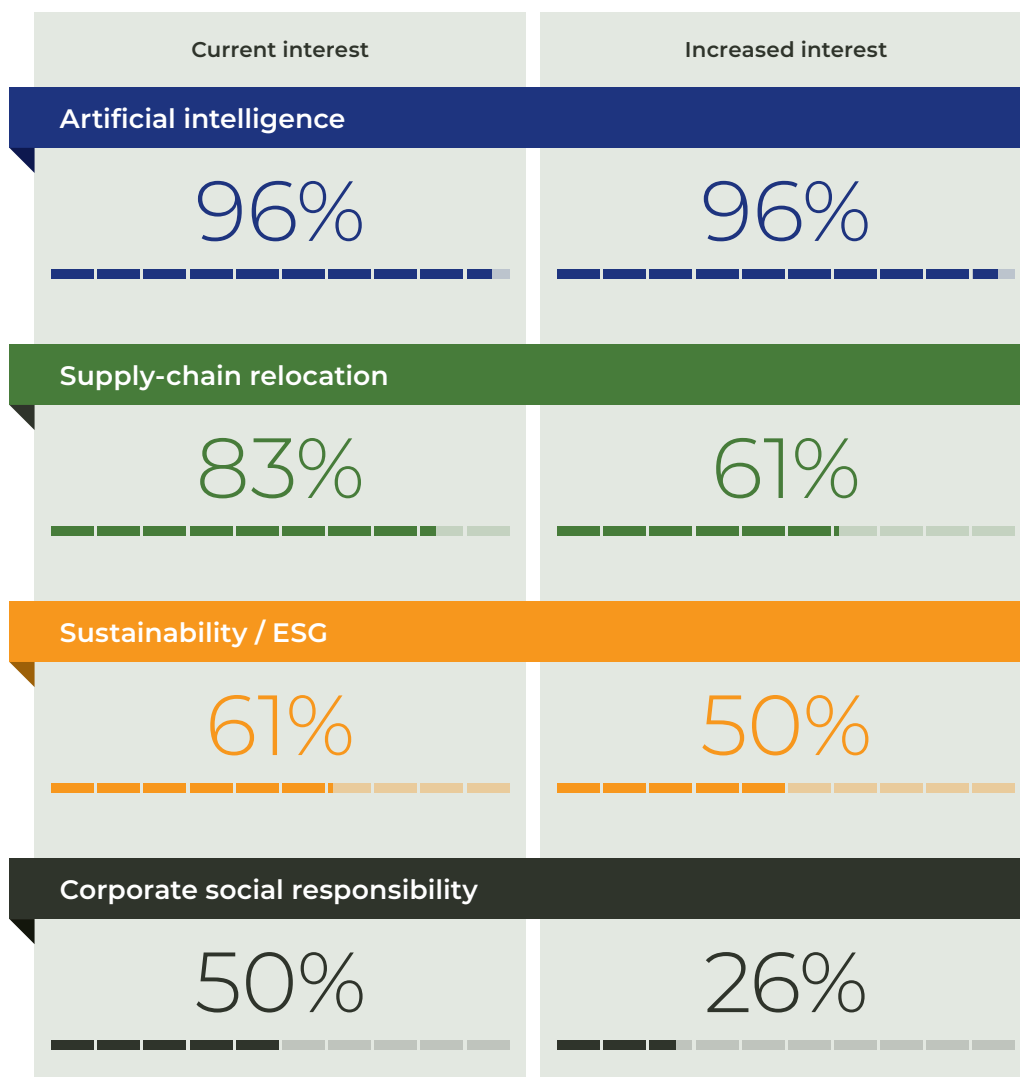
- Core European markets remain essential, particularly Germany, France, Italy, Spain, the United Kingdom, Switzerland and neighbouring markets.
- Members are also increasing attention to the United States and Canada; the Gulf and wider Middle East; India; Japan and South Korea; Southeast Asia; North Africa; Latin America; and markets linked to new supply-chain opportunities.
- Sectors rising in importance include defence and cyber-security; healthcare, pharmaceuticals and life sciences; renewable energy and clean technologies; digital and AI-enabled services; advanced manufacturing; agrifood technology; infrastructure, logistics and aerospace.

Strategic interpretation

The survey shows a dual strategy: deepen opportunities within the Single Market and established export destinations, while helping companies diversify, reduce dependencies and access new growth markets.

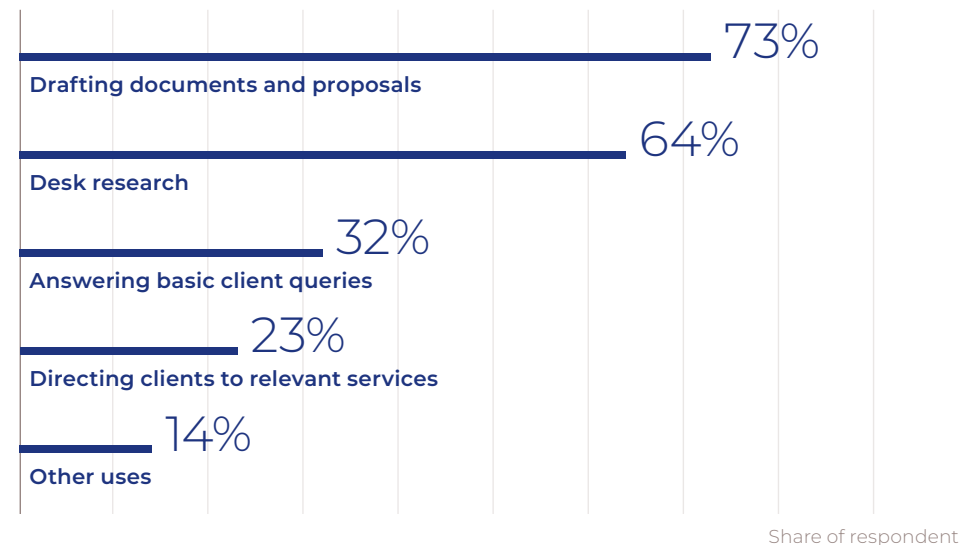
AI, supply-chain resilience and sustainability are reshaping trade-promotion services.

CLIENT INTEREST & CHANGE OVER THE PAST YEAR



HOW MEMBERS CURRENTLY USE AI

Adoption is currently concentrated on internal productivity rather than full service transformation.



Sustainability and ESG support

- 67% provide sector-specific sustainability/ESG advice; 60% provide CSR advice; 20% provide related financial support.

Services members are considering

- More targeted support for start-ups and mid-caps; export acceleration; analytics and data-driven advice; innovation and entrepreneurship support; networking and pitching; digital tools; sector expansion; and more tailored international expertise.

Interpretation

Demand is moving faster than many institutional service models.

TPE can help members test practical tools, share AI governance and use cases, improve data and analytics, and avoid duplicating development work across agencies.

A substantial delivery infrastructure operating under uneven and sometimes tightening resource conditions.

WORKFORCE & INTERNATIONAL PRESENCE

Indicator	Finding
Workforce location	56% at headquarters; 11% in secondary domestic offices; 33% abroad.
Employees abroad	71% locally contracted; 29% on headquarters contracts.
Office changes in 2025	Six offices opened and eleven closed among reporting members.
Staffing changes	Six members increased headcount; four reduced it.

SHARE OF COMBINED REPORTED FUNDING

Funding source	Share
National government	53%
Client invoicing	16%
Regional government	13%
EU funding	8%
Private funding	6%
Other	3%

EU programme participation: 12 respondents benefited from EU funding in 2025. Seven reported ERDF support and four participated in the Enterprise Europe Network. Members also accessed DG AGRI programmes, Horizon Europe, LIFE, Erasmus+, recovery instruments and other initiatives.

BUDGET OUTLOOK FOR 2026

Expected change	Share of respondents
Increase	28%
Remain stable	40%
Decrease	24%
Not yet known	8%

STRATEGY AND PERFORMANCE MEASUREMENT

Indicator	Share
Have an annual or multi-year strategy	92%
Update strategy every year	42%
Use client satisfaction as a KPI	88%
Use number of companies served	83%
Use additional export revenue	36%
Use an overall impact score	28%
Track additional jobs created	28%

Management insight

Members are generally strong at measuring activity, reach and satisfaction. Outcome, additionality and economic-impact measurement are less consistent—creating a clear opportunity for common methods, peer learning and proportionate indicators through TPE.

A European delivery network, knowledge platform and policy-feedback channel.

EU policy → TPE network → national/regional delivery → SMEs → implementation feedback → EU policy

TPE members provide a domestic entry point for companies and connect them with expertise, markets and partners through extensive European and international networks.

TPE'S ADDED-VALUE FUNCTIONS

Function	Value for members & EU stakeholders
Strategic intelligence	Curated EU policy, programme, consultation and market-relevant information that members can translate into company support.
Peer learning and benchmarking	A trusted space to compare service models, identify emerging needs and develop practical solutions.
Professional capacity	Training, thematic workshops and communities of practice that strengthen TPO/APO expertise.
One European voice	Structured engagement with EU institutions so that practical trade-promotion experience informs policies and programmes.
Joint initiatives and partnerships	A platform for collaborative projects, EU funding, international partnerships and coordinated action around shared priorities.
Visibility and evidence	Collective communications, data and research that make the role and impact of trade promotion more visible.

EVIDENCE OF TPE DELIVERY IN 2025

2025 result	What it delivered
47 editions of TPE Weekly	Continuous curated EU intelligence for members.
15 Masterclass sessions; 32 participants	Practical professional development and a shared learning community.
Six Working Groups and two Committees	Peer exchange on Ukraine, Global Gateway, sustainability, e-commerce, supply chains, security and defence, agrifood promotion and strategic advice.
Five European Commission stakeholder platforms	Ongoing engagement through DG AGRI, DG GROW, DG INTPA, DG ENEST and DG TRADE-related platforms and networks.
Two General Assemblies and 100+ Annual Conference participants	Governance, strategic alignment, institutional access and cross-network exchange.
One EU project partnership	Associated Partner in the EU SME Centre in China Phase IV.
Three new members and +1,041 LinkedIn followers	Network growth and increased collective visibility.

ECONOMIC CASE FOR TRADE PROMOTION

Findings from the **TPE–University of Geneva Impact Study**

0.069%

Increase in export growth associated with a 1% increase in a TPO budget

0.090%

Increase in GDP per capita associated with a 1% increase in a TPO budget

€172

Export revenue generated for every €1 spent by a TPE TPO

€396

GDP growth generated for every €1 spent by a TPE TPO

Commission-facing conclusion

TPE offers EU institutions access to an established European community that combines policy understanding with direct contact with internationally ambitious firms. It can help test policy ideas, communicate opportunities, gather implementation feedback and improve the coherence of support for SME internationalisation, diversification and competitiveness.