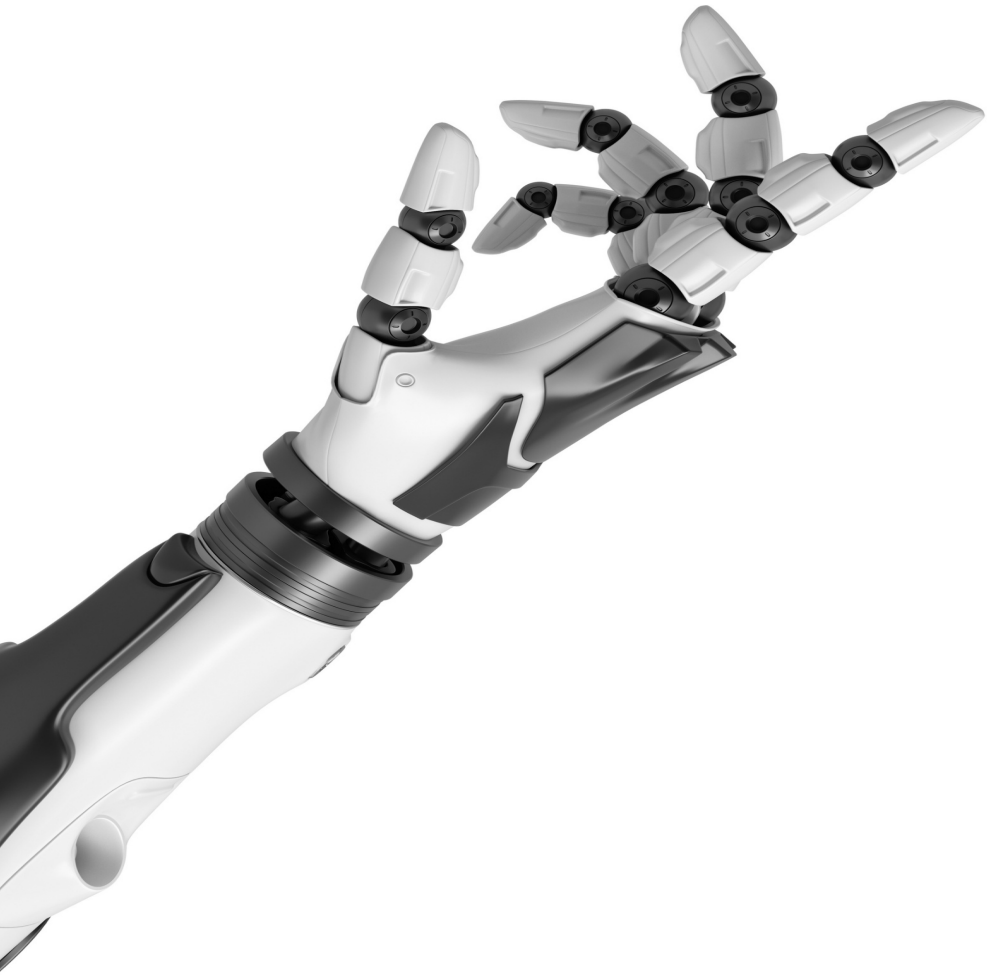




Global Business Opportunities at CES 2026

December 18, 2025





FAQs

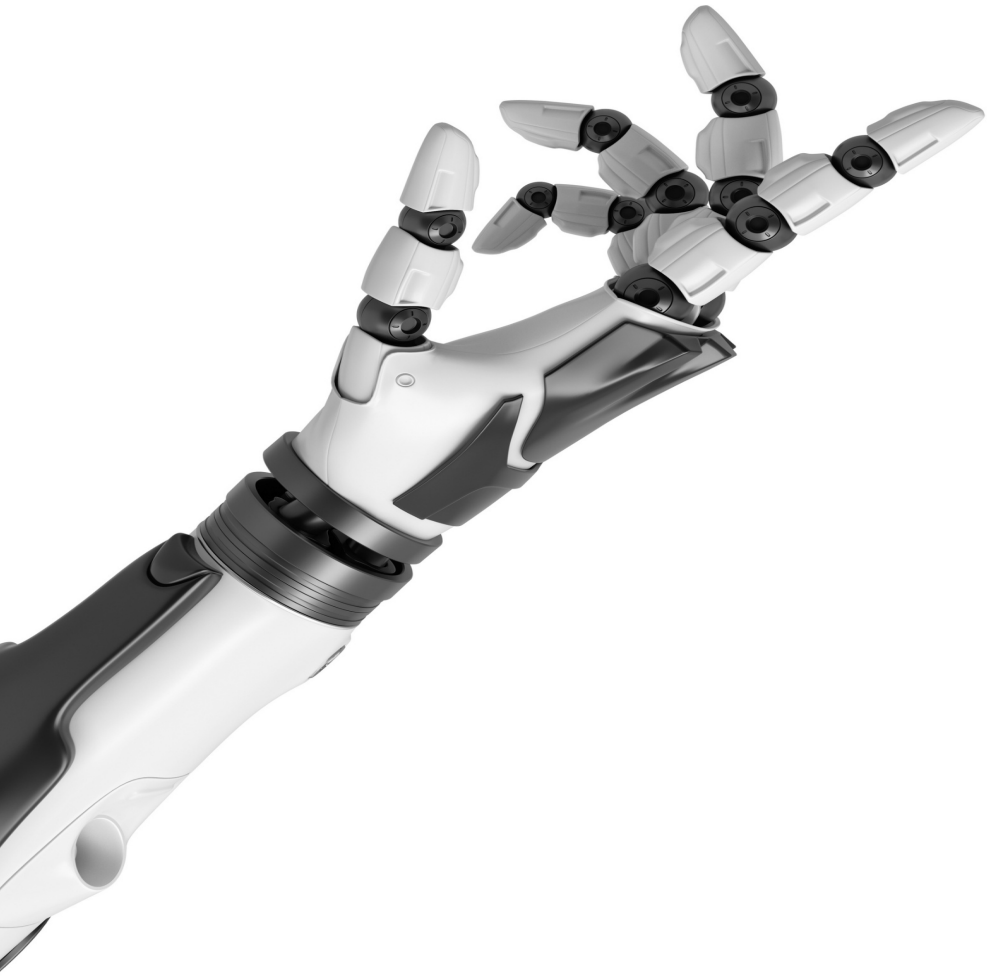
- This webinar is being recorded
- Participants are in listen only mode
- Slides will be provided
- Ask questions in Q&A



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. COMMERCIAL SERVICE Overview

trade.gov/export-solutions



Webinar Agenda

- CES 2026: Intro and Resources by CTA Representative
- Who is U.S. Commercial Service and how do I use them at CES?
- Germany's Digital Economy, AI, Cybersecurity, and Quantum industry
- Italy trade overview and buyer interests



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. COMMERCIAL SERVICE Overview

trade.gov/export-solutions

innovators show up

An illustration of four stylized people with futuristic tech accessories. From left to right: a person with a large circular earpiece, a person with a red wrist device, a person with a transparent visor and yellow glasses, and a person with a head-mounted display and yellow glasses. They are all looking upwards with expressions of awe or excitement. The background is a solid blue color.

JAN. 6-9, 2026 LAS VEGAS, NV



2026 Know Before You Go Webinar

PRESENTED BY:

Rebecca Lind
Specialist, International Programs

Danna Sherif
Coordinator, International Programs

Agenda

1

CES and the
2025 Global Impact

2

Campus Overview

3

What to Expect

4

Logistics and
Travel Tips

5

Business Centers and
the Mobile App

6

Questions?
Delegations@cta.tech

About CES

CES is the most powerful tech event in the world — the proving ground for breakthrough technologies and global innovators.

This is where global brands get business done, meet new partners and where the industry's sharpest minds take the stage to unveil their latest releases and boldest breakthroughs.



CES 2026 | Jan 6-9, 2026





TOTAL ATTENDANCE
142K+



Domestic



International

158

Countries, Territories and Regions Represented

62%

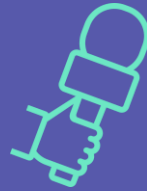
of attendees have a significant buying
influence for their organization

53%

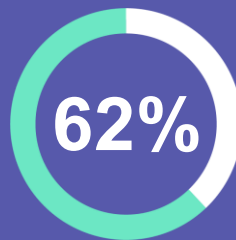
of registered attendees are senior-level*

*President/Owner, C-level, VP, Director/Sr. Manager/General Manager

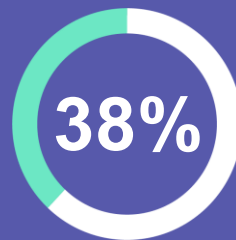
THE GLOBAL IMPACT OF CES 2025



MEDIA ATTENDANCE
6500+



Domestic



International

292K+

Pieces of Media
Published

1.05T

Estimated Total
Coverage Reached



GLOBAL EXHIBITORS
4500+ 1400
Total Exhibitors Startups



CONFERENCE
PROGRAMMING
AND KEYNOTES

300+

Conference Sessions

1200+

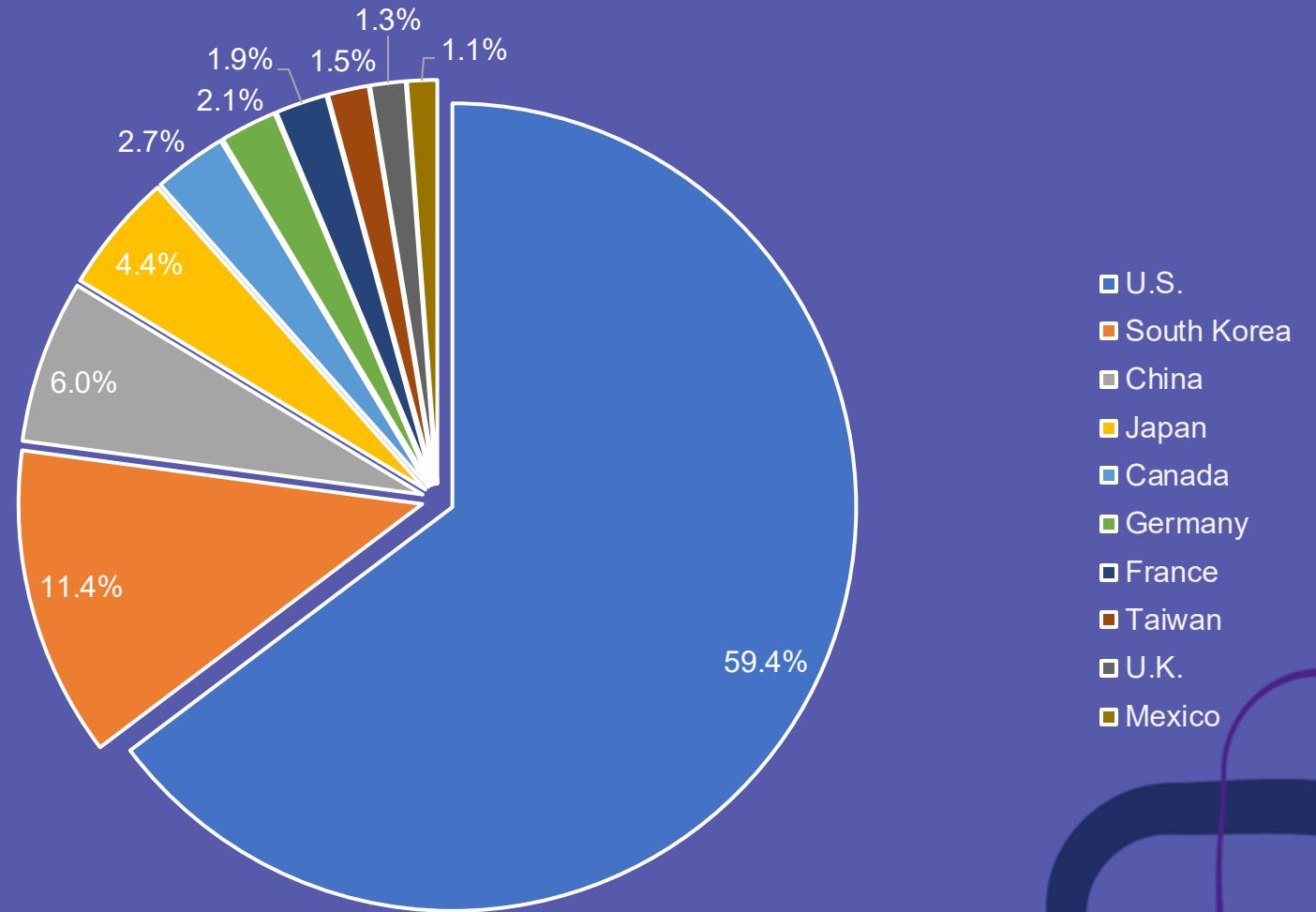
Speakers

All figures are from the CES 2025 Audit.
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All rights reserved. | CES.tech

CES 2025 Attendees By The Numbers

U.S., South Korea, China, Japan, Canada, Germany, France, Taiwan, U.K., Mexico top 10 countries in attendance

40%
international attendees
(driven by growth from APAC)



Delegation Program Stats

150 Delegation Leaders

42 USDOC Delegation Leaders

Top 5 Countries and their recruitment numbers

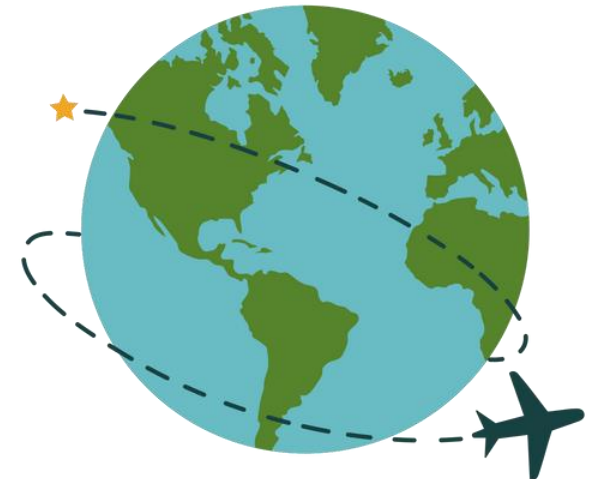
1. South Korea
2. Japan
3. China
4. Germany
5. India

58 Total Recruiting Countries

27 Delegation Leaders with over 50 delegates

New countries:

1. French Polynesia
2. Mozambique
3. Saudi Arabia
4. Georgia
5. Malaysia
6. Kuwait



CES 2026: Delegation Program

Benefits Refresher

All Delegations enjoy:

- Discounted registration upgrade rates to access exclusive conference programming
- Dedicated support from our CES International Programs team
- Show Floor Tours discount



Don't forget to share and promote your delegation with our recruitment graphics!





CES 2026: Campus Overview

Navigating Las Vegas

Download the campus maps and interactive floorplans to design your visit:

Visit CES.tech, navigate to **Explore CES** in the top menu, and select **Maps and Locations**.

View the **2026 Floor Plan** to explore the interactive CES maps!

Next: Campus Breakdowns



LVCC Campus

- ❖ Las Vegas Convention and World Trade Center (LVCC)
- ❖ Westgate
- ❖ Renaissance
- ❖ Fontainebleau

Venetian Campus

- ❖ Venetian Expo
- ❖ The Venetian
- ❖ Palazzo Hotel
- ❖ Wynn Las Vegas
- ❖ Encore at Wynn

C Space Campus

- ❖ C Space at ARIA
- ❖ Cosmopolitan
- ❖ Park MGM
- ❖ Vdara

Mandalay Bay

- ❖ Media Days (Media Only)
- ❖ CES Unveiled: Sunday, Jan 4
- ❖ Exhibitor Press Conferences: Sunday, Jan 4 & Monday, Jan 5



LVCC Campus Map

LVCC Campus

- ❖ Las Vegas Convention and World Trade Center (LVCC)
- ❖ Westgate
- ❖ Renaissance
- ❖ Fontainebleau

Venetian Campus

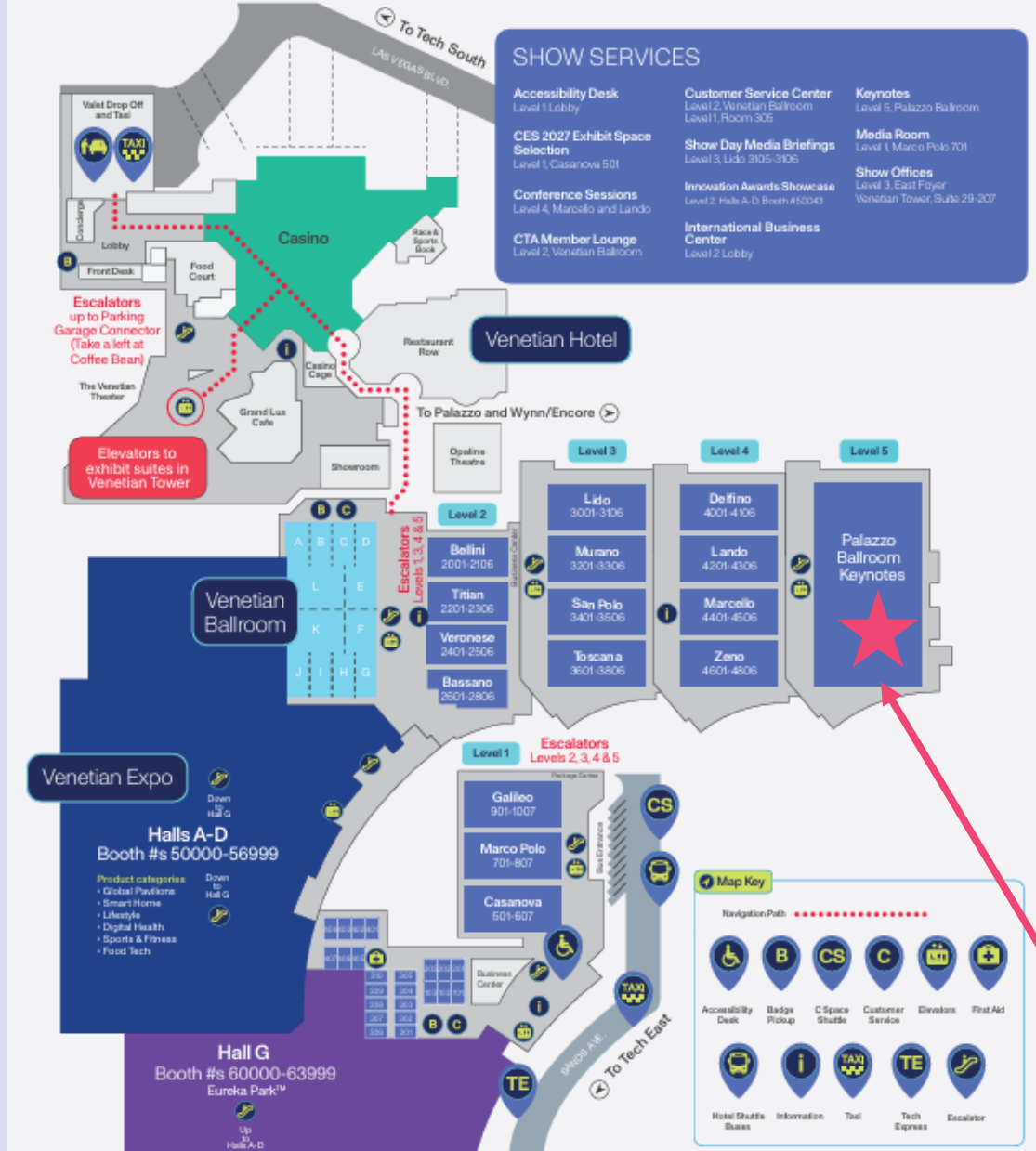
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- ❖ The Venetian
- ❖ Palazzo Hotel
- ❖ Wynn Las Vegas
- ❖ Encore at Wynn

C Space Campus

- ❖ C Space at ARIA
- ❖ Cosmopolitan
- ❖ Park MGM
- ❖ Vdara

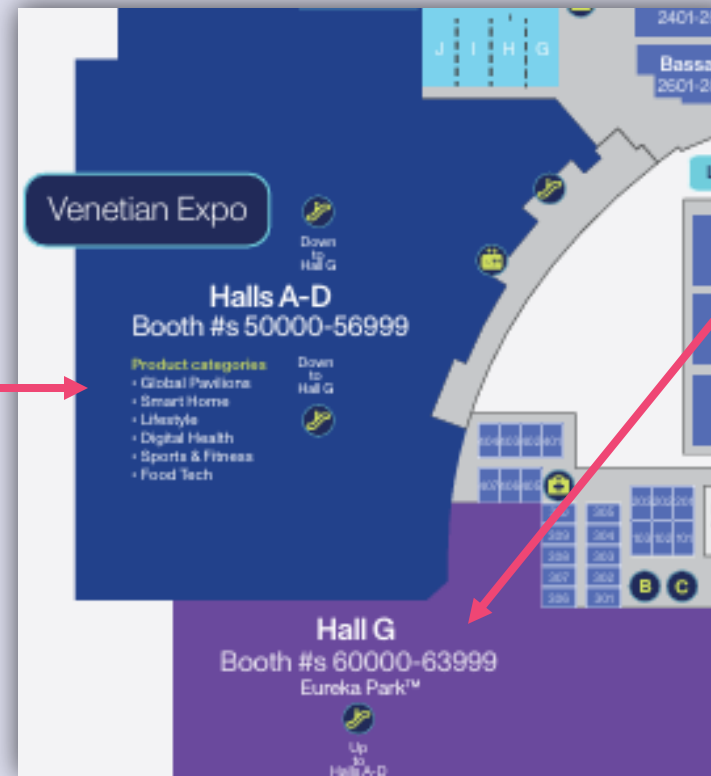
Mandalay Bay

- ❖ Media Days (Media Only)
- ❖ CES Unveiled: Sunday, Jan 4
- ❖ Exhibitor Press Conferences: Sunday, Jan 4 & Monday, Jan 5



Venetian Campus Map

Global Pavilions are country-led exhibition spaces where companies showcase products together—maintaining their own identity while gaining visibility through a unified national presence. Find them in the Venetian Expo above Eureka Park.



Eureka Park at the Venetian Expo is CES's premier startup hub, connecting disruptors with investors and showcasing breakthrough innovations.



Eureka Park and Global Pavilions

LVCC Campus

- ❖ Las Vegas Convention and World Trade Center (LVCC)
- ❖ Westgate
- ❖ Renaissance
- ❖ Fontainebleau

Venetian Campus

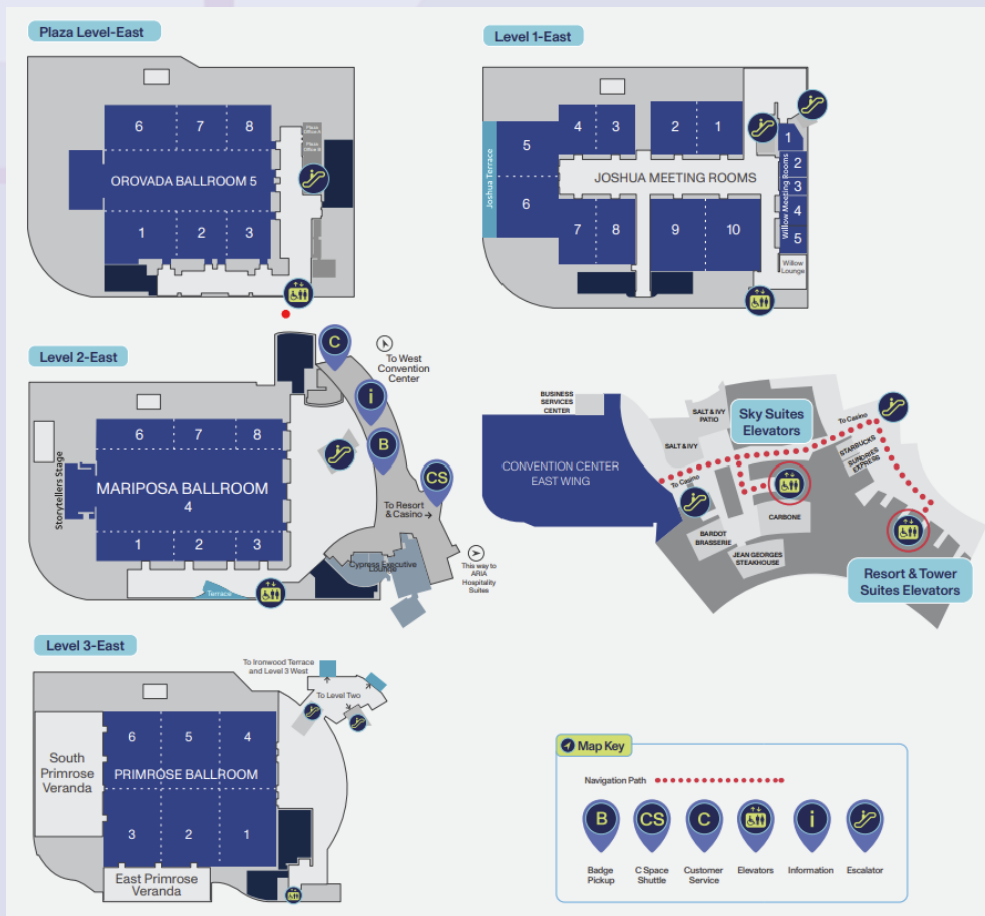
- ❖ Venetian Expo
- ❖ The Venetian
- ❖ Palazzo Hotel
- ❖ Wynn Las Vegas
- ❖ Encore at Wynn

C Space Campus

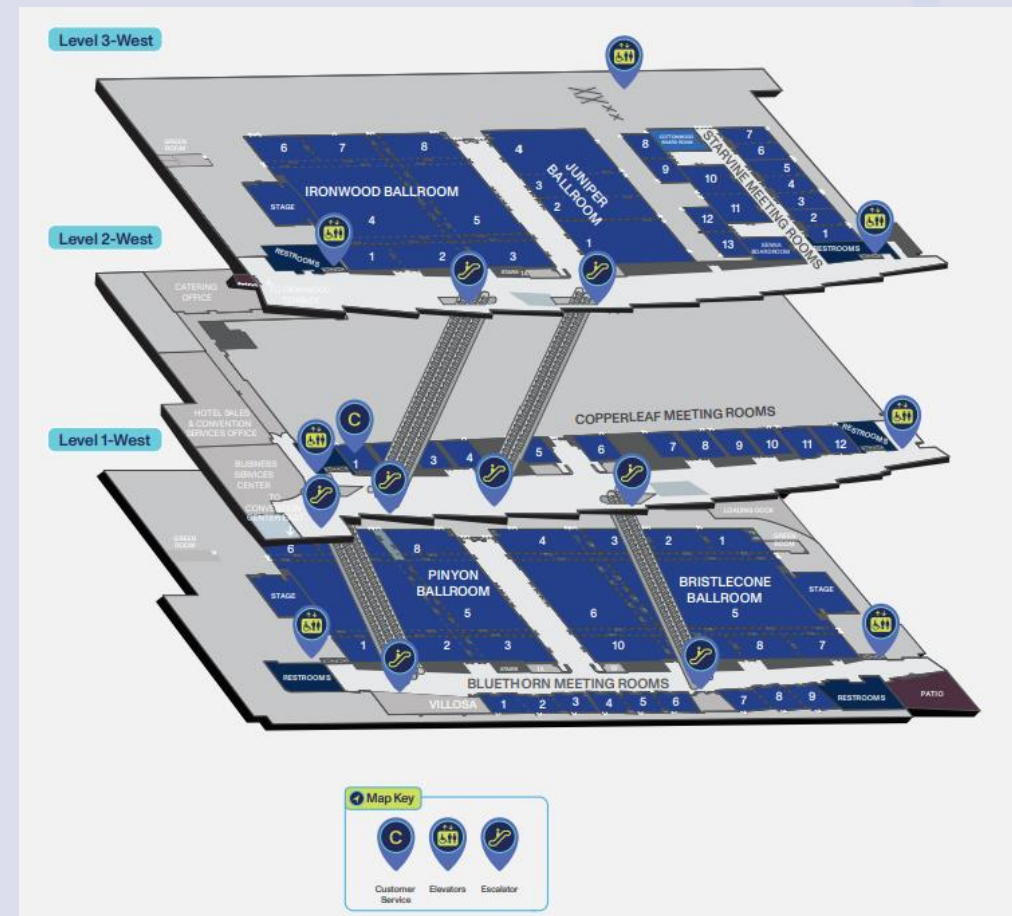
- ❖ C Space at ARIA
- ❖ Cosmopolitan
- ❖ Park MGM
- ❖ Vdara

Mandalay Bay

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Aria EAST



Aria WEST

C Space Campus Map

LVCC Campus

- ❖ Las Vegas Convention and World Trade Center (LVCC)
- ❖ Westgate
- ❖ Renaissance
- ❖ Fontainebleau

Venetian Campus

- ❖ Venetian Expo
- ❖ The Venetian
- ❖ Palazzo Hotel
- ❖ Wynn Las Vegas
- ❖ Encore at Wynn

C Space Campus

- ❖ C Space at ARIA
- ❖ Cosmopolitan
- ❖ Park MGM
- ❖ Vdara

Mandalay Bay

- ❖ **Media Days**
(Media Only)
- ❖ **CES Unveiled:**
Sunday, Jan 4
- ❖ **Exhibitor Press Conferences:**
Sunday, Jan 4
&
Monday, Jan 5



CES 2026: What to Expect

2026 CES Keynotes



Dr. Lisa Su
Chair and CEO
AMD



Roland Busch
President and CEO
Siemens AG



Yangqing Yang
Chairman and CEO
Lenovo
 sphere



Joe Creed
CEO
Caterpillar



(joint keynote)



GENERAL



CATALYST

Bob Sternfels
Global Managing Partner
McKinsey & Company

Hemant Taneja
CEO
General Catalyst



Yangqing Yang
Chairman and CEO
Lenovo

Keynote Tips:

- Seating is first come, first served
- Lines start 1 hour prior to the Keynote's start time
- You can also stream through the CES Mobile App!

CES 2026 KEYNOTES

Monday, January 5:

6:30 PM | AMD

Dr. Lisa Su, Chair and CEO, AMD
Level 5, Palazzo Ballroom, The Venetian

Tuesday, January 6

8:30 AM | CTA Opening Keynote

Gary Shapiro, CEO and Vice Chair, CTA and Kinsey Fabrizio, President, CTA
Level 5, Palazzo Ballroom, The Venetian

9:00 AM | Siemens

Roland Busch, President and COE, Siemens AG
Level 5, Palazzo Ballroom, The Venetian

2:00 PM | McKinsey/General Catalyst

Bob Sternfels, Global Managing Partner, McKinsey & Company and Hemant Teneja, CEO, General Catalyst
Level 5, Palazzo Ballroom, The Venetian

Tuesday, January 6

5:00 PM | Lenovo

Yangqing Yang, Chairman and CEO, Lenovo
Las Vegas Sphere

Wednesday, January 7, 2026

9:00 AM | Caterpillar

Joe Creed, CEO, Caterpillar
Level 5, Palazzo Ballroom, The Venetian

New this year!



CES | Foundry
A bold new community for **AI**,
blockchain, and **quantum innovation**

January 7-8, 2026
Fontainebleau Las Vegas



CES Foundry is the heartbeat of AI and Quantum innovation at CES. Hosted at the Fontainebleau Las Vegas, just steps from the Convention Center, this two-day experience is where visionaries, disruptors, and global leaders come together to build what's next.

Step into immersive discussions, dynamic product showcases, and high-impact networking. From AI ethics to enterprise transformation, quantum security to decentralized finance, this is where futures are forged.

Artificial Intelligence



Transforming industries. Opening up new capabilities. Enhancing efficiencies. Artificial intelligence is already enhancing our lives in profound ways — and the possibilities for the future are seemingly limitless.

**CES Foundry
Fontainebleau**

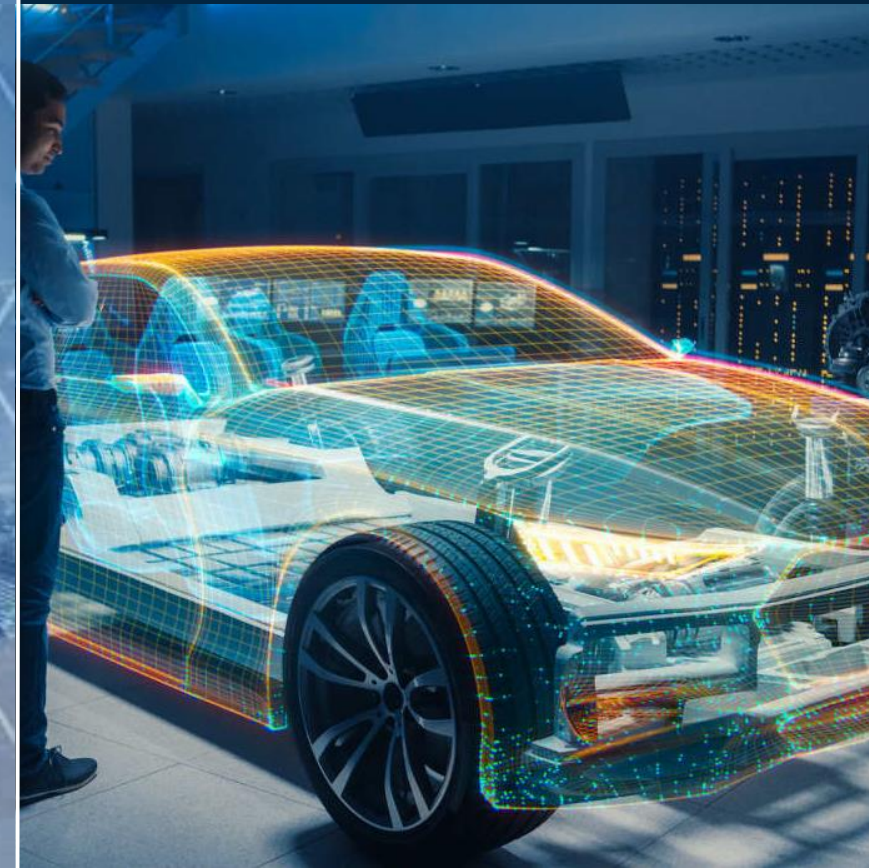
Digital Health



Explore the latest advancements in AI, IoT, telehealth, and digital health solutions. These groundbreaking technologies are reshaping healthcare delivery, improving patient outcomes, and enhancing operational efficiency.

**Digital Health Summit
Venetian Expo, Level 2**

Vehicle Tech and Advanced Mobility



From autonomous and connected vehicles to advancements in air transport, technology has transformed the way we experience mobility.

**LVCC
West Hall**

Audio and Visual



Food Tech



Enterprise



Entertainment & Culture



Smart Home



Sustainability & Smart Communities



Space Tech



Gaming & Esports



Tech Trends at CES 2026

Discover this year's biggest trends and innovations in the [CES Content Library](#)

tech trends: mobility

#CES2026

JAN. 6-9, 2026
LAS VEGAS, NV

Driving the Future of Mobility at CES 2026

VEHICLE TECH AND ADVANCED MOBILITY

From autonomous vehicles to air taxis, CES 2026 is where the full mobility ecosystem takes shape. See groundbreaking innovations on land, air, and sea — all redefining how the world moves.

tech trends: AI

#CES2026

JAN. 6-9, 2026
LAS VEGAS, NV

AI Everywhere: Inside CES 2026

ARTIFICIAL INTELLIGENCE ROBOTICS

tech trends: digital health

#CES2026

JAN. 6-9, 2026
LAS VEGAS, NV

The Future of Health Tech at CES 2026

DIGITAL HEALTH ACCESSIBILITY

the creator experience at CES

#CES2026

JAN. 6-9, 2026
LAS VEGAS, NV

Why CES Is the Ultimate Event for Creators

CES 2026: Innovation Awards



The world-renowned **CES Innovation Awards®** program is an annual competition honoring outstanding design and engineering in consumer technology products.

The program recognizes honorees in a multitude of technology product categories and distinguishes the highest rated in each.

**Venetian Expo, Level 2, Hall A,
Booth 50043**



Know before you go:
Logistics and Travel

International Travel Tips and Discounts

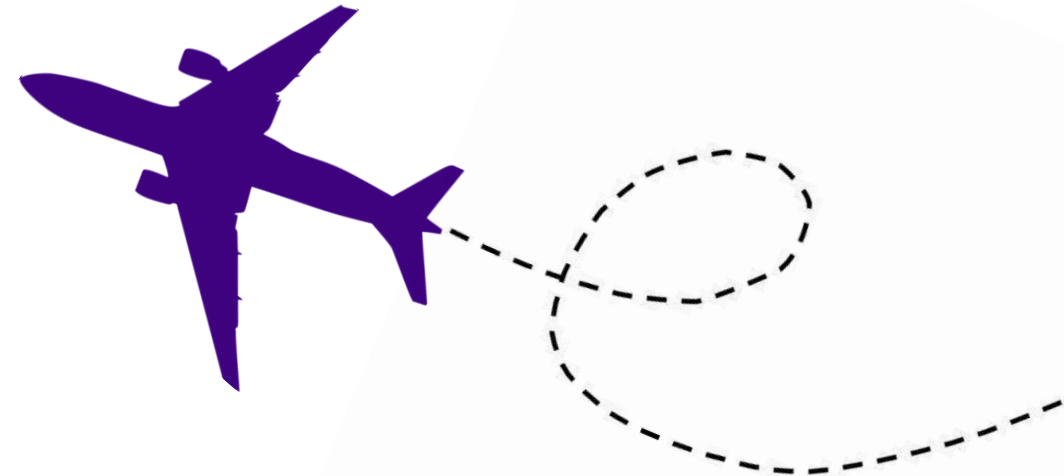
Let's make your CES experience seamless, so you can focus on what really matters:

Shaping the Future

To support your experience, we offer dedicated international resources that guide you through the visa application process and pre-show planning:

Attendee Travel Benefits:

- Discounts on [Air Travel](#)
- CES Exclusive [Hotel Blocks](#)
- [International Step-by-step guide](#)
- [Travel and Visas](#)



Complimentary Transportation

Shuttle Schedule

Boarding Locations at LVCC & Venetian

LVCC – Routes 1-8 will be available in both the South Hall & West Hall bus areas*

Venetian Expo – Venetian underground shuttle area (Routes 3-8)

*The West Hall also serves Fontainebleau Hotel

All Day Route

7

	Inbound (every 20 min)	Midday (every 20 min)	Outbound (every 20 min)
Monday	-----	8 AM-6 PM	-----
Tuesday-Thursday	7:30-10:30 AM	10:30 AM-4 PM	4-6:30 PM
Friday	7:30-10:30 AM	10:30 AM-2 PM	2-4:30 PM

Tech Express

9

Between LVCC & Venetian
(every 10 min)

Monday	8 AM-6 PM
Tuesday-Thursday	7:30 AM-6:30 PM
Friday	7:30 AM-4:30 PM

Split Day Routes

1

2

3

4

5

6

8

	Inbound (every 20 min)	Midday (every 30 min)	Outbound (every 20 min)
Monday	-----	8 AM-6 PM	-----
Tuesday-Thursday	7:30-10:30 AM	-----	4-6:30 PM
Friday	7:30-10:30 AM	-----	2-4:30 PM

Shuttle Routes

Hotel

Boarding Locations

Please Note: Official CES 2026 badges are required to ride CES Shuttles.

1

Encore at Wynn

Wynn

At Wynn, South Gate Bus Area
(Service to LVCC only)
South Gate Bus Area (Service to LVCC only)

2

Treasure Island

Tour Bus Area (Service to LVCC only)

3

MGM Grand
New York New York
Signature at MGM

Grand Garden Entrance
Valet Entrance
At MGM Grand, Grand Garden Entrance

4

Mandalay Bay
W Las Vegas

Shark Reef Entrance
At Mandalay Bay, Shark Reef Entrance

5

Circa
The D Las Vegas
The Golden Nugget
The Plaza

The Golden Nugget, Carson Tower Entrance
The Golden Nugget, Carson Tower Entrance
Carson Tower Entrance
The Golden Nugget, Carson Tower Entrance

6

Bellagio
Cosmopolitan*

*Accessible via Route 7/ARIA during midday shuttle hours

Tour Bus Area
Tiffany Lot

7

CES
C Space
ARIA
Park MGM
Vdara at City Center

Tour Bus Area
At ARIA, Tour Bus Area
At ARIA, Tour Bus Area

8

Excalibur
Luxor

Tour Bus Area/Rotunda Entrance
At Excalibur, Tour Bus Area/Rotunda
Entrance

9

Tech Express

Express service provided between the LVCC and Venetian Campuses from Monday through Friday.

Boarding locations:

LVCC – Central Plaza near Monorail Station

Venetian Expo – Curbside on Sands Ave.

Additional Services:

- Airport Shuttle
- Las Vegas Monorail

CES 2026 Shuttle Flyer



CES 2026 | Jan 6-9, 2026

Badge Pickup Details

IMPORTANT: You must pick up your own CES® badge **BEFORE** entering show facilities.

- All show attendees, including media and individual exhibitor personnel must pick up their own CES 2026 official badge at a remote badge pickup location. You cannot pick up badges for other attendees.
- To pick up your badge at a remote badge pick up location, you must present the following:
 - Government-issued photo ID
 - Registration confirmation – either saved in your Google or Apple wallet or confirmation email with QR code to scan.

If you or your delegates have not yet completed registration, you may do so on site.

Expect long lines.

[BADGE PICK UP INFORMATION](#)

20+ Badge Pickup Locations!

- Harry Reid International Airport, Baggage Claim, Terminal 1
- Harry Reid International Airport, Baggage Claim, Terminal 3 West (United)
- Harry Reid International Airport, Baggage Claim, Terminal 3, International
- LVCC, Central Hall 2, Patio
- LVCC, Central Hall, Level 1 Meeting Room, N102 near C5 Entrance
- LVCC, South Hall 1, Patio
- LVCC, South Hall 2, Lobby
- LVCC, West Hall 4, Patio
- ARIA, East Convention Space, Level 2, Mariposa Foyer
- Bellagio, Registration Desk 1
- Cosmopolitan, Level 2, Condesa Registration Desk
- Encore at Wynn, near Las Vegas Loop Station Entrance
- Encore at Wynn, outside of the Encore Theater Promenade
- Excalibur, Shuttle Bus Rotunda
- Fontainebleau Las Vegas, South Lobby Kiosk
- Golden Nugget, Conference Center Registration Desk, Level 2
- Mandalay Bay, Front Desk Check-In
- Mandalay Bay, Convention Center, Level 1, Bayside Foyer
- MGM Grand, Hotel Lobby Desk near Mobile Check-In
- Palazzo, Main Entrance Lobby near to VIP Check-In
- Resorts World, near the Las Vegas Loop Entrance
- Venetian Hotel, Front Desk Check-In
- Westgate, Ballroom Foyer
- Wynn Las Vegas, Registration Desk 3 across from Wynn Bus Lobby



Know before you go:
Business Centers

CES Attendee and International Business Centers (IBC)

Amenities include:

- Complimentary Wi-Fi
- Laptop and laptop stations
- Printers
- Private meeting rooms
- Lounge areas
- Light refreshments

DATE	Operating Hours
January 6, 2026	8:30 AM – 6:00 PM
January 7, 2026	8:30 AM – 6:00 PM
January 8, 2026	8:30 AM – 6:00 PM
January 9, 2026	8:30 AM – 4:00 PM

Business Centers

VENETIAN EXPO

♀ Level 1 Lobby

702-733-5070

♀ FedEx Office: Level 2 (near Bellini 2006)

702-836-4400



LVCC: FedEx Offices

♀ Grand Lobby Concourse

♀ West Hall 2 Lobby

♀ Front of South Hall 1

702-733-2898



ARIA

♀ Level 2, West Convention Space

702-590-9750



CES 2026 | Jan 6-9, 2026

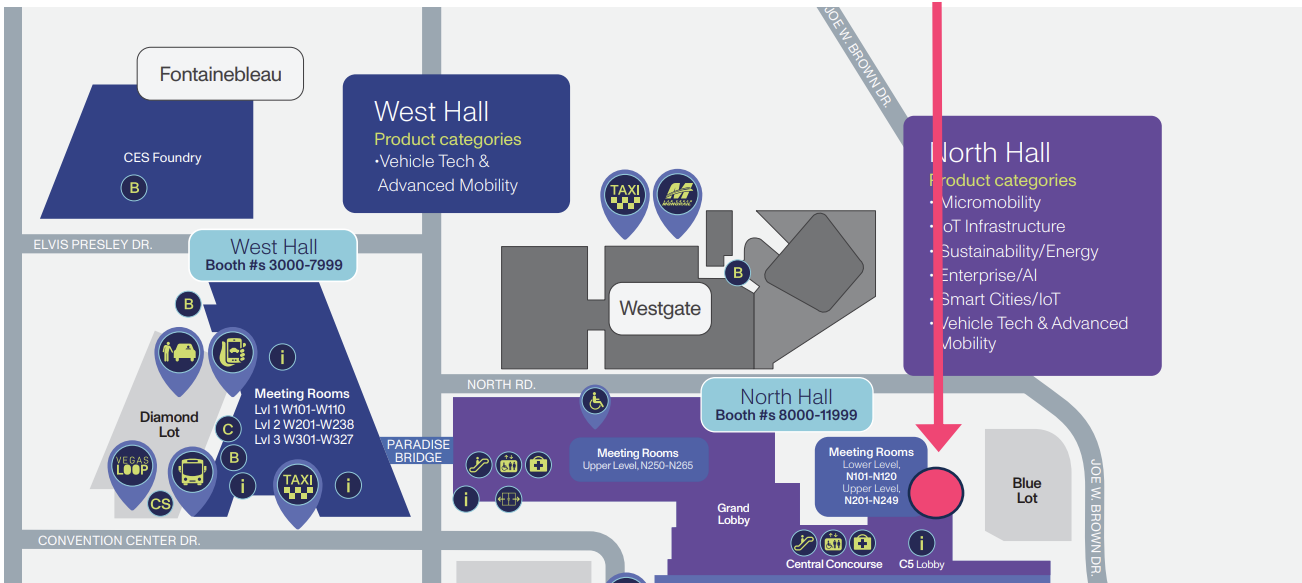
International Business Centers (IBC)

****International Badge required for entry**

LVCC IBC

📍 North Hall 219

Available Translators:
Mandarin and French



VENETIAN IBC

📍 Venetian Upper Lobby (L2)

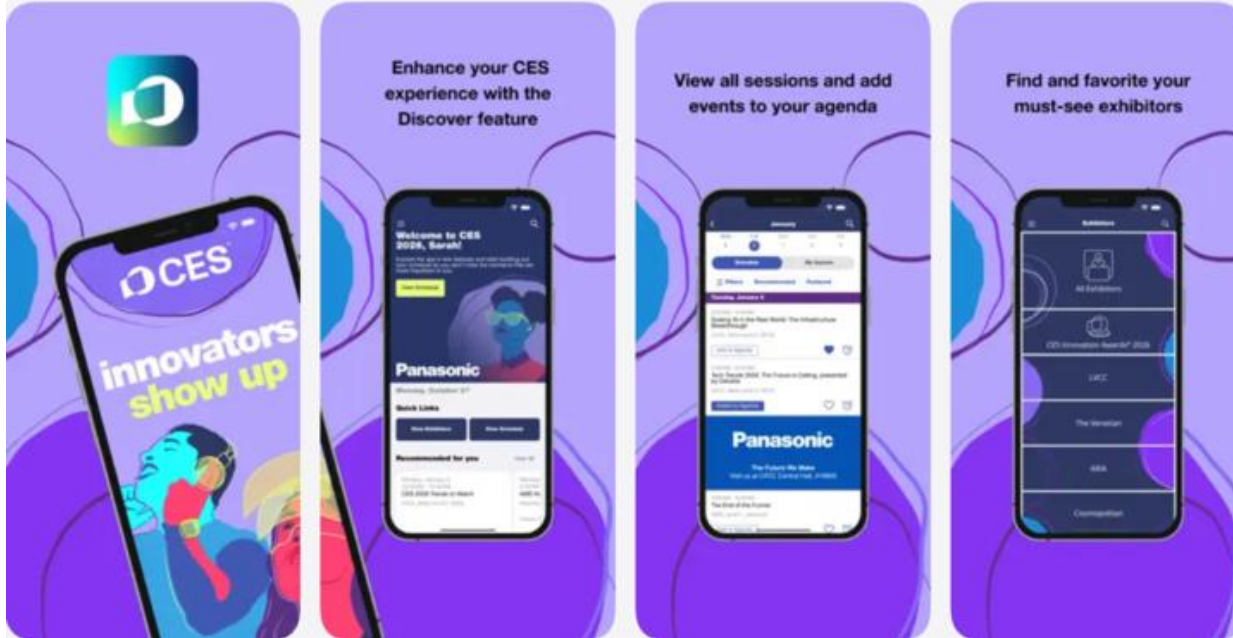
Available Translators:
Spanish and Japanese





CES 2026: Mobile App

CES 2026 Mobile App



iOS Download



Google Download



CES 2026 | Jan 6-9, 2026

CES 2026 MOBILE APP Sponsored by *Panasonic*

Download the official show app to access everything you need to plan for and navigate the show.

NEW 2026 FEATURES

- Attendee Connect:
 - Attendees can share contact information with one another via a secure QR Code
- In-App Live Translation
 - Select sessions will have live audio translation available directly in the mobile app!
- Ask AI Chat Bot
 - Get quick AI Answers to your pressing CES Questions
- Live Transportation Updates
 - Real Time wait times for your route, including capacity information



Powered by The Consumer Technology Association®

YOU'RE INVITED

Vocês estão convidados

邀請您

당신은 초대되었습니다

usted está invitado

Ты приглашен

أنت مدعو

あなたは招待されて

Siete invitati

Sie sind herzlich eingeladen

bạn được mời

jste pozváni

vous êtes invités



Please join us for the

International Reception

Tuesday, January 6, 2026 | 7-8:30 PM

Venetian - Level 1, Casanova 605

Don't miss this opportunity to network, connect with your colleagues from around the world, and enjoy light refreshments after an exciting day on the CES show floor. This event is open to all international attendees, exhibitors, and media.

Please bring your CES 2026 show badge for entry.



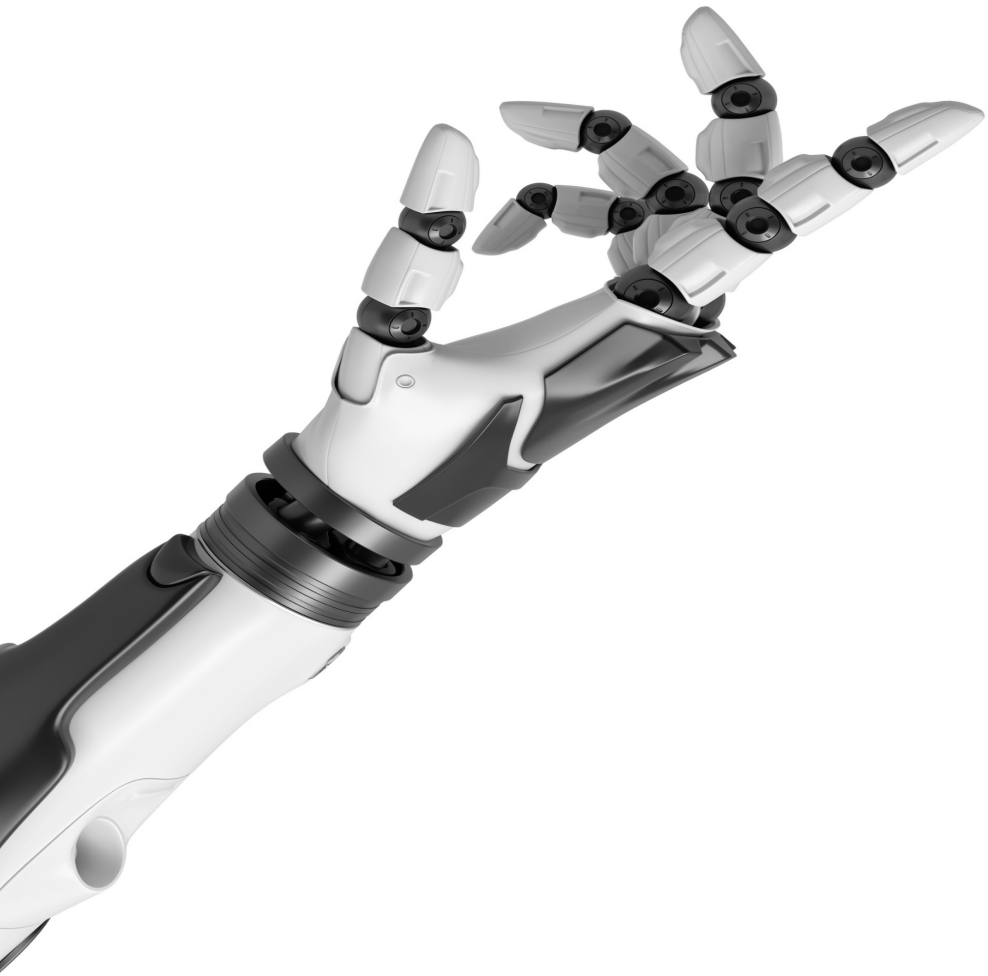
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THANK YOU

Questions? Contact Us!



Delegations@CTA.tech



The U.S. Commercial Service

Crystal Mills
International Trade Specialist
Charlotte, North Carolina

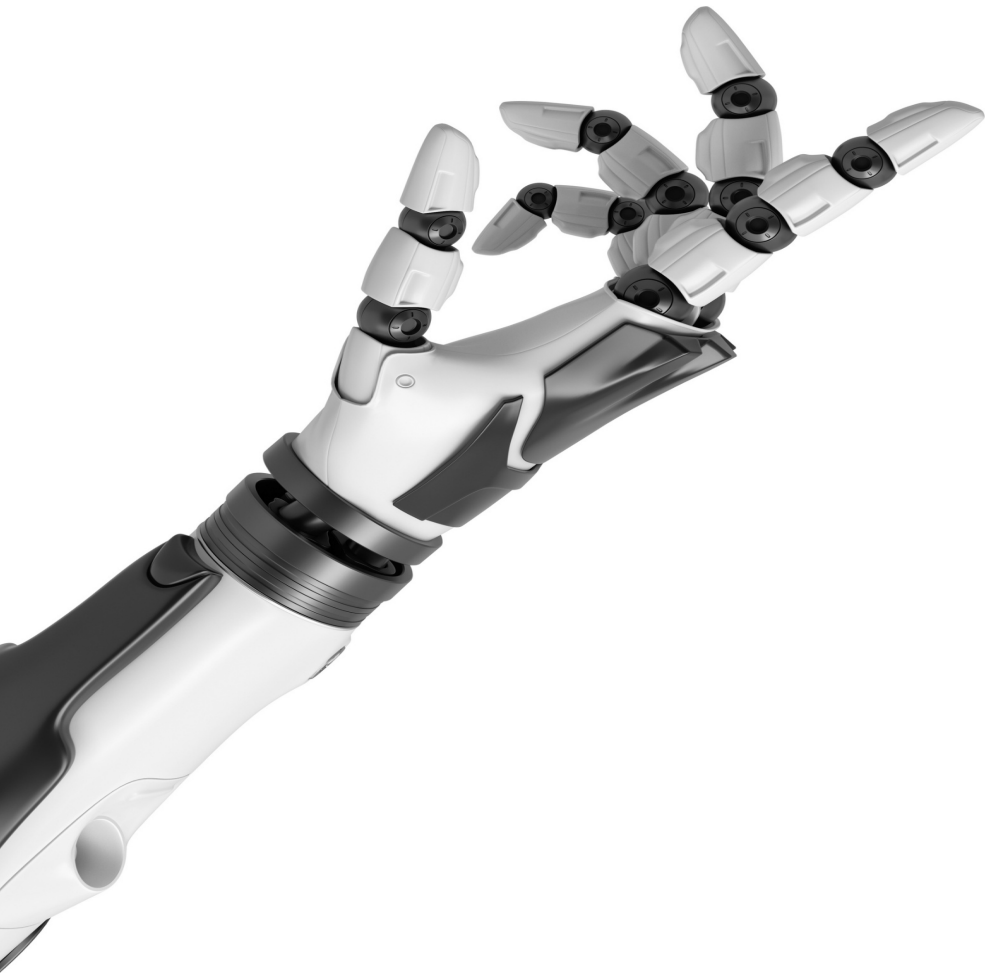
Who are we?
How can your company use us at CES?



INTERNATIONAL
TRADE
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U.S. COMMERCIAL SERVICE Overview

trade.gov/export-solutions

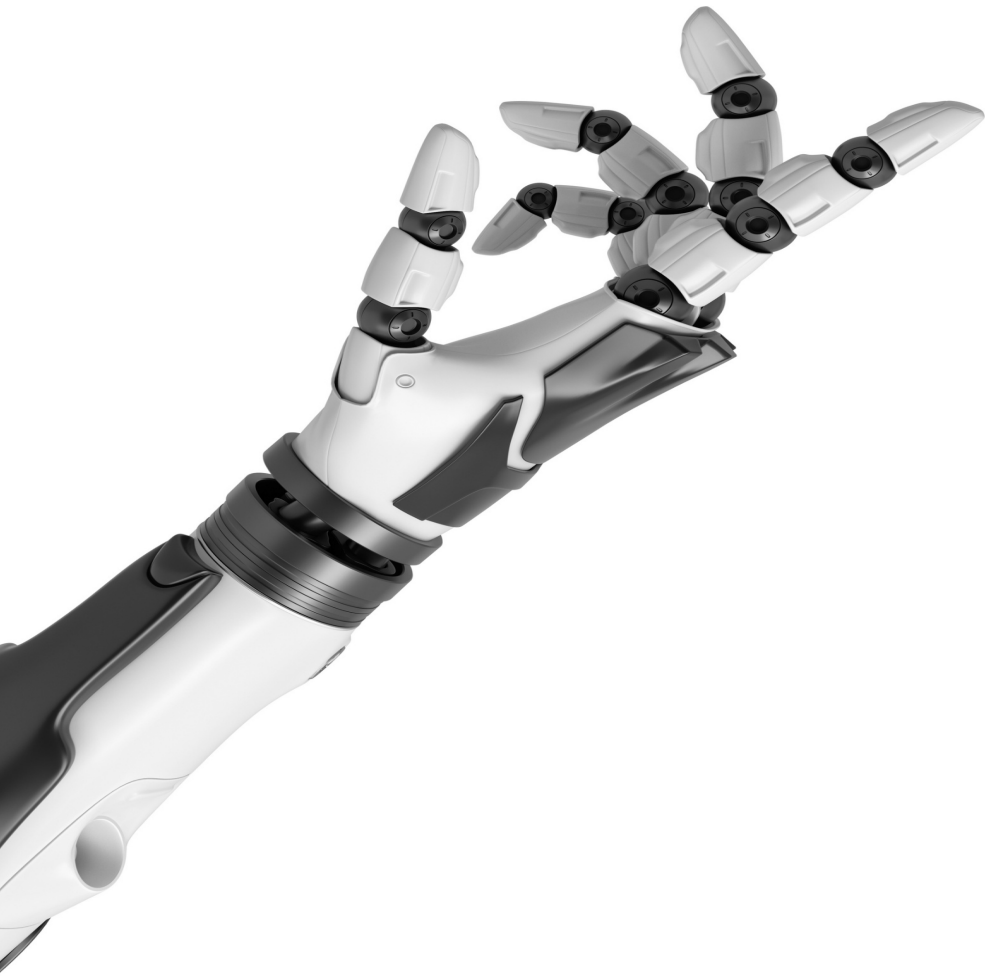


Our Global Presence

The U.S. Commercial Service, creates jobs in the United States and strengthens U.S. economic and national security by promoting U.S. exports, and ensuring market access and a level playing field in international trade for U.S. companies.

Strategically located in **106 U.S. and 127 foreign locations** in 80 countries, our global network of trade and investment professionals are well-positioned to help U.S. companies succeed internationally and ensure that U.S. businesses and commercial interests have a robust advocate and first line of defense against unfair foreign trade practices and market access barriers.





The world is open for your business.

Our global network of experienced trade professionals is located throughout the United States and in U.S. Embassies and Consulates worldwide. Whether you're looking to make your first export sale or expand to additional markets, we offer the expertise you need to connect with opportunities and increase your bottom line.

Our Services



Export Counseling

- Learn about the export process and develop effective market entry and sales strategies.
- Find out about export documentation requirements and import regulations of foreign markets.
- Learn about U.S. government export controls, compliance and trade financing options.



Market Intelligence

- Analyze market potential and foreign competitors.
- Obtain useful information on best prospects, financing, laws, and cultural issues.
- Conduct background checks on potential buyers and distributors.



Business Matchmaking

- Connect with pre-screened potential partners.
- Promote your product or service to prospective buyers at trade events worldwide.
- Meet with international industry and government decision makers in your target markets.



Commercial Diplomacy/Advocacy

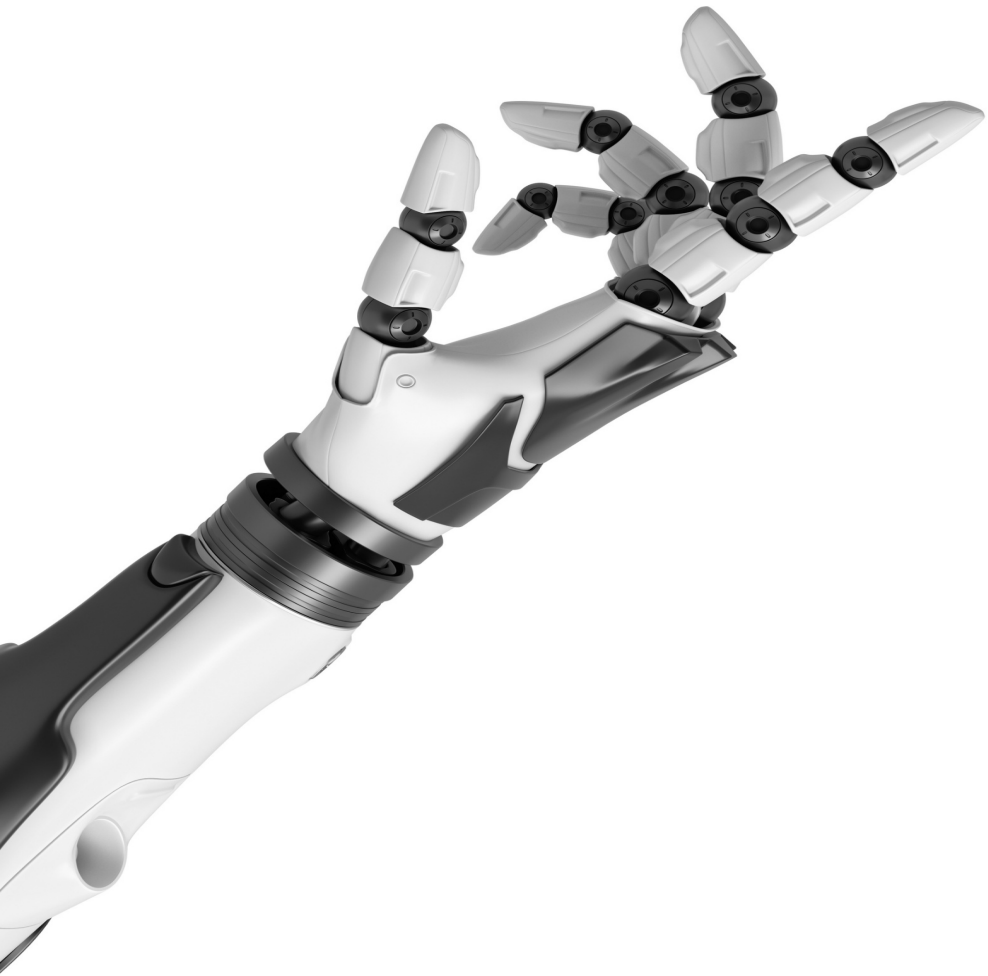
- Address trade obstacles to successfully enter international markets.
- The Advocacy Center can facilitate coordinated U.S. government engagement with foreign governments to protect U.S. business interests.



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. COMMERCIAL SERVICE Overview

trade.gov/export-solutions



At CES

Recruiting international buyers

Austria
Bulgaria
Canada
China
Czech Republic
Ecuador
Germany
Hong Kong
Hungary
Israel
Nigeria
Peru

Philippines
Poland
Romania
Singapore
Slovenia
South Korea
Thailand
Netherlands
Tunisia
Türkiye
Ukraine
Vietnam



INTERNATIONAL
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trade.gov/export-solutions



At CES

Global Connections Meet and Greet

**International Business Center
Venetian
Lobby Level 2**

Thursday January 8 from 3-5 PM

**Bulgaria
Germany
Israel
Poland
Ukraine
Vietnam**



INTERNATIONAL
TRADE
ADMINISTRATION

U.S. COMMERCIAL SERVICE Overview

trade.gov/export-solutions



Shari Stout **Principal Commercial Officer** **Frankfurt, Germany**

Our Mission: Grow U.S. exports to increase U.S. Jobs

U.S. Commercial Service - Germany

Our Mission: Grow U.S. exports to increase U.S. Jobs





Region: Germany and the EU



Digital Economy

Regulatory Environment Germany/ EU
Markets of Opportunity in EU
Germany



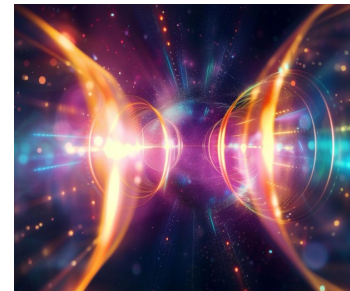
Cybersecurity

Regulatory Environment Germany/EU
Markets of Opportunity in EU
Germany



Artificial Intelligence

Regulatory Environment Germany/ EU
Markets of Opportunity in EU
Germany



Quantum

Regulatory Environment Germany/EU
Markets of Opportunity in EU
Germany

Digital Economy

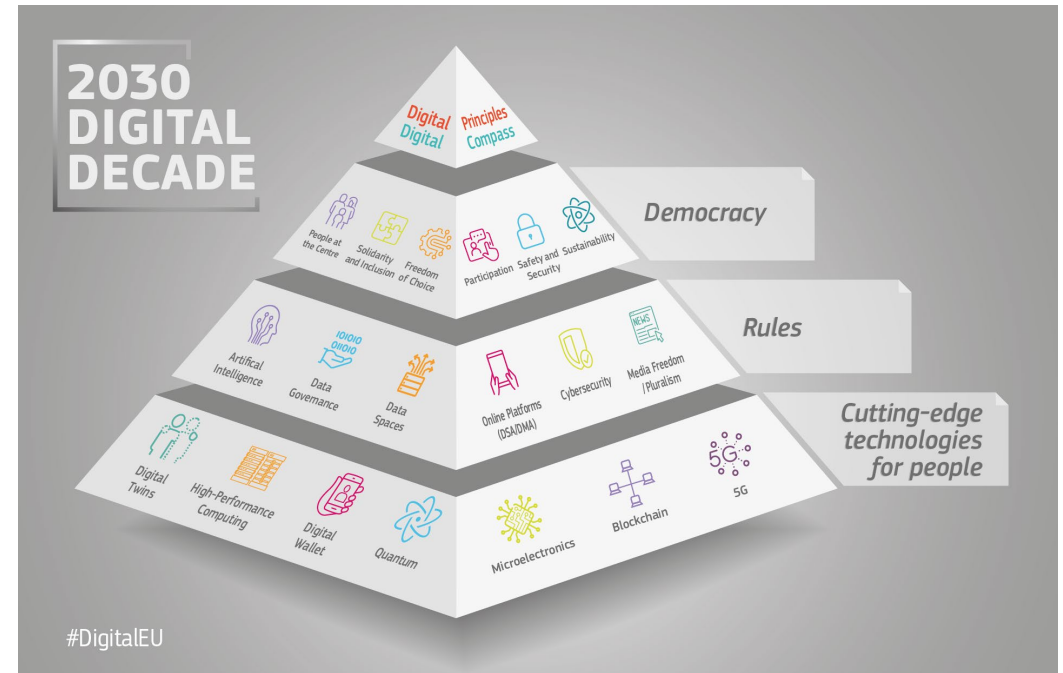
Europe Digital Economy

The United States and the European Union (EU)'s 27 Member States share a €1.68 trillion economic relationship, the largest economic relationship in the world. The digital economy underpins practically every aspect of it.

A Europe fit for the digital age is one of the European Commission's political priorities. To create a digital environment where everyone in Europe can access and utilize digital technologies effectively

Germany Digital Economy

Germany is one of the United States' most significant trading partners and its digital economy is of fundamental importance to Germany's federal government. Digital technologies influence most aspects of its current trade and security strategies. Germany's digital economy has seen significant and stable growth over the past years, not being impacted by the economic slowdown found in other sectors. It has grown to be worth over \$250 billion in 2024, up from \$239 billion in 2023.



Europe as a Hub for AI Development

- Europe has become a hub for artificial intelligence (AI) research and development, with numerous companies at the forefront of innovation
- The EU's approach to artificial intelligence centers on excellence and trust, aiming to boost research and industrial capacity while ensuring safety and fundamental rights
- Leibniz Association and Helmholtz Association are two German research institutes.



The German Federal Government about Germany as a Center for AI

Germany's Federal Minister for the new ministry called Federal Ministry for Digital and State Modernization emphasizes the German government's clear goal:

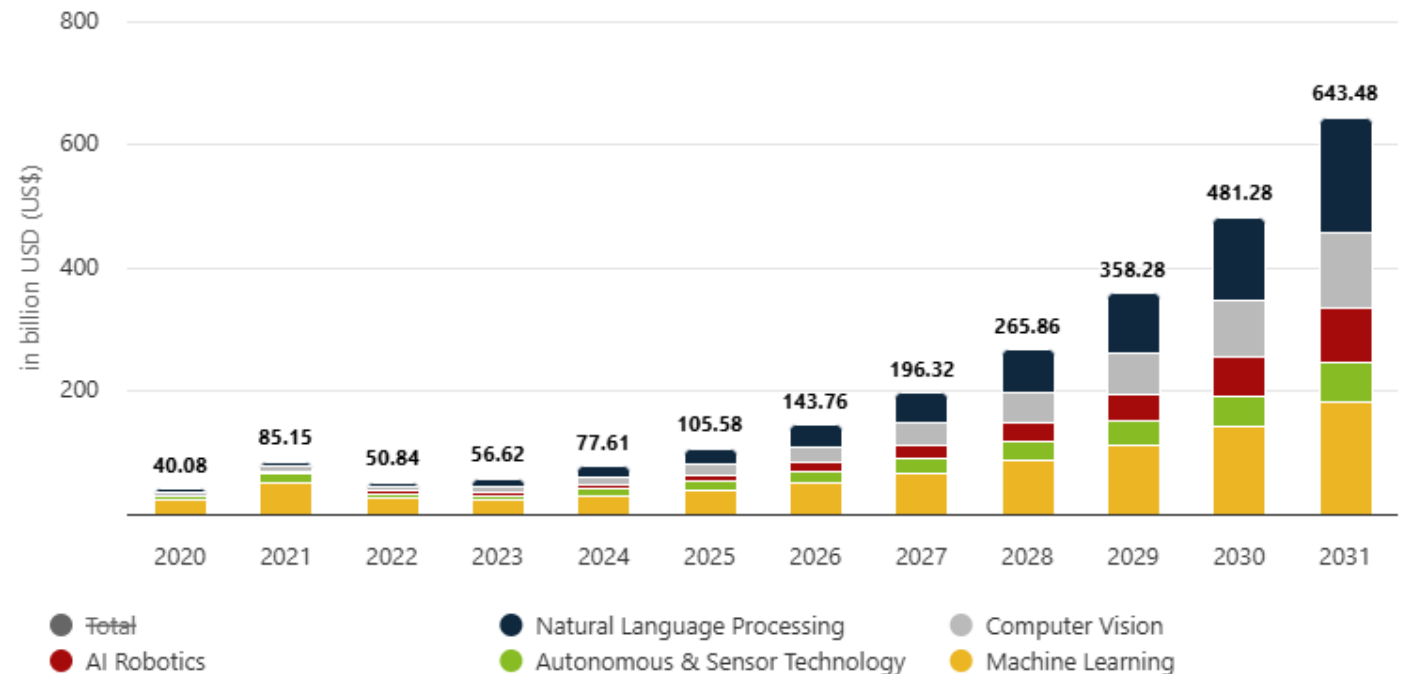
- to make Germany the driving force behind digitalization in Europe
- making digitalization and state modernization a top priority

The federal government is creating the conditions for this:

- providing support through nationwide AI centers in which it creates testing opportunities for practical application and offers help with legal issues

Europe Artificial Intelligence: *Where will it grow?*

- The market size in the Artificial Intelligence market is projected to reach US \$143.76bn in 2026.
- The market size is expected to show an annual growth rate (CAGR 2025-2030) of 35.7%, resulting in a market volume of US \$481bn by 2030.
- In global comparison, the largest market size will be in the United States (US\$143bn in 2026).



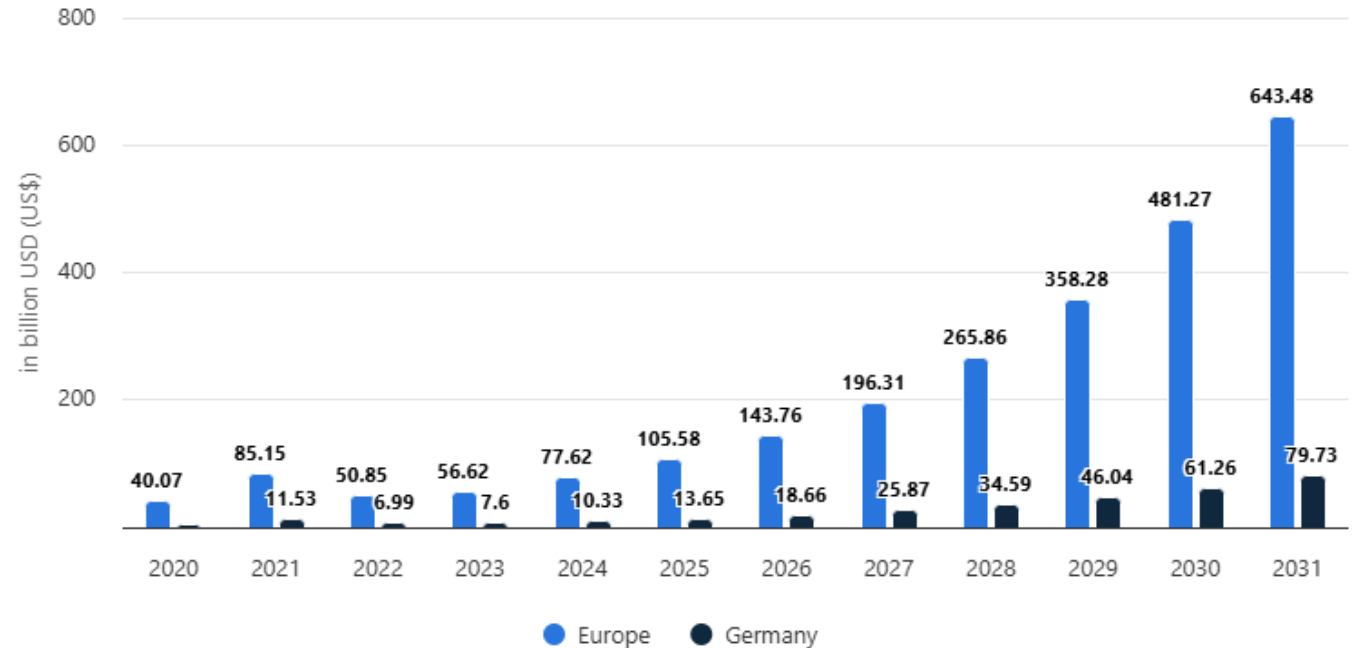
Notes: Data was converted from local currencies using average exchange rates of the respective year.

Most recent update: Oct 2025

Source: Statista Market Insights

Artificial Intelligence: *Germany in Focus*

- The market size in the Artificial Intelligence market is projected to reach US\$18.6bn in 2026.
- The market size is expected to show an annual growth rate (CAGR 2025-2030) of 35.4%%, resulting in a market volume of US\$61bn by 2030.



Notes: Data was converted from local currencies using average exchange rates of the respective year.

Most recent update: Oct 2025

Source: Statista Market Insights

Cybersecurity:

Regulations concerning Cybersecurity

EU Cybersecurity Act



- The European Cybersecurity Act has been in force since June 27, 2019, giving the European Union Agency for Cybersecurity (ENISA) a permanent mandate and creating a European certification framework for ICT products and services.
- In 2022, the EU approved the NIS 2.0 Directive to strengthen cybersecurity and align standards across member states.
- Germany adopted the NIS 2 Implementation Act in November 2025, which became law on December 6, 2025.
- NIS 2.0 aims to boost digital resilience, harmonize security standards, and may position Germany as a leader in European IT Security.

Cybersecurity:

Regulations concerning Cybersecurity



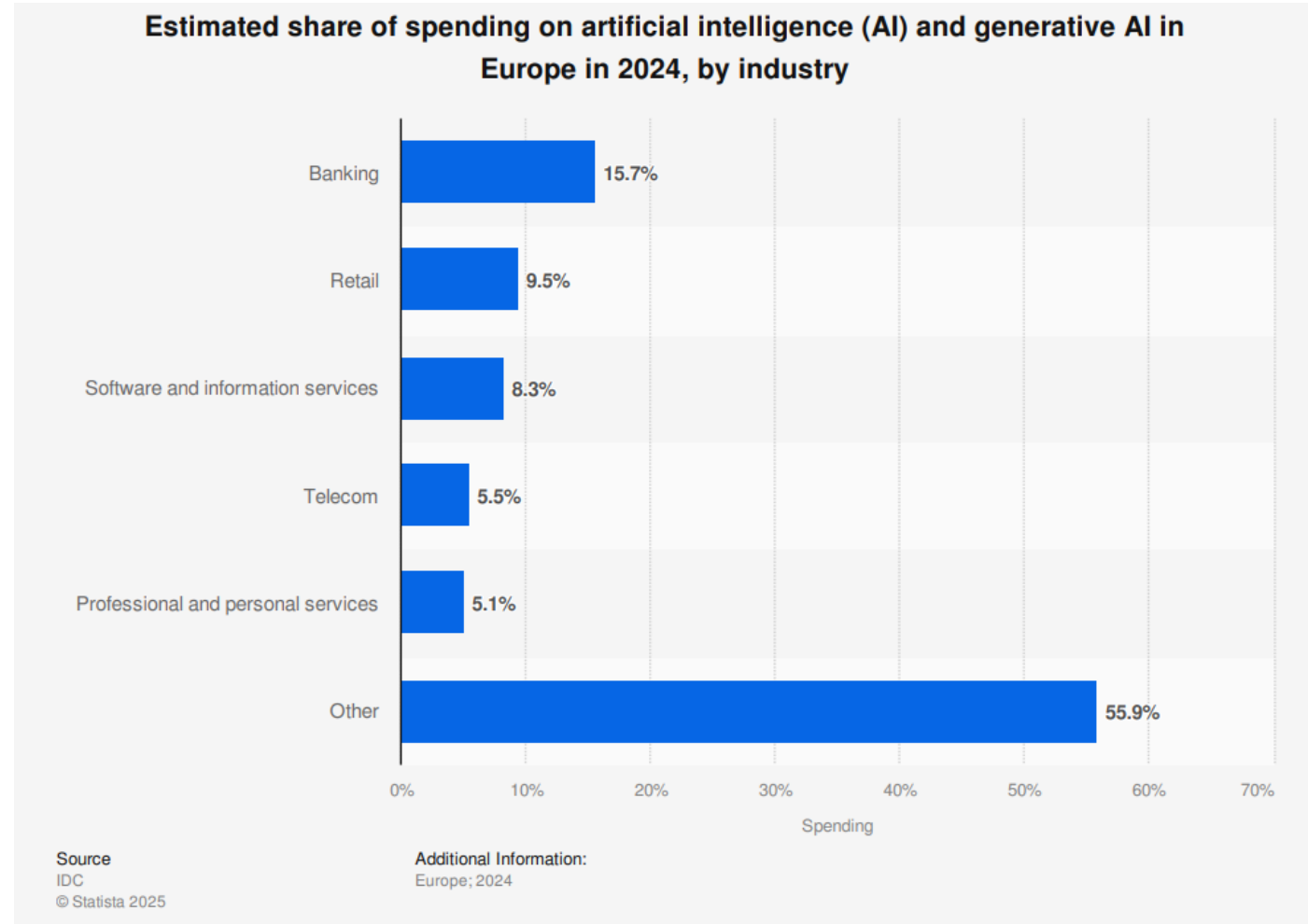
The German Federal Government's Cybersecurity Strategy

- In 2021, the German Government adopted the “Cybersecurity Strategy for Germany 2021”.
- The Cybersecurity Strategy 2021 defines four overarching guidelines:
 - Establish cybersecurity as a joint task of the state, business, society and science
 - Strengthen the digital sovereignty of the state, business, science and society
 - Designing digitalization securely
 - Designing measurable and transparent goals
- These guidelines apply to four defined fields of action of the cybersecurity strategy.
- An evaluation report for the strategy was published in August this year determining that the four main action areas still reflect the major cybersecurity challenges today.

Cybersecurity:

Where will it grow?

- 20 out of the 46 top performers in the Global Cybersecurity Index are European countries.
- In 2025, the European Commission allocated over €1.4 billion in cybersecurity grants under the Digital Europe Program, with funding directed toward cross-border infrastructure and threat intelligence sharing networks.
- The EU has more than 60,000 cybersecurity companies and more than 660 centers of cybersecurity expertise.



Quantum

Europe Strategy at a glance

- The European Commission adopted a Quantum Strategy to position Europe as a global leader in quantum by 2030.

Goals:

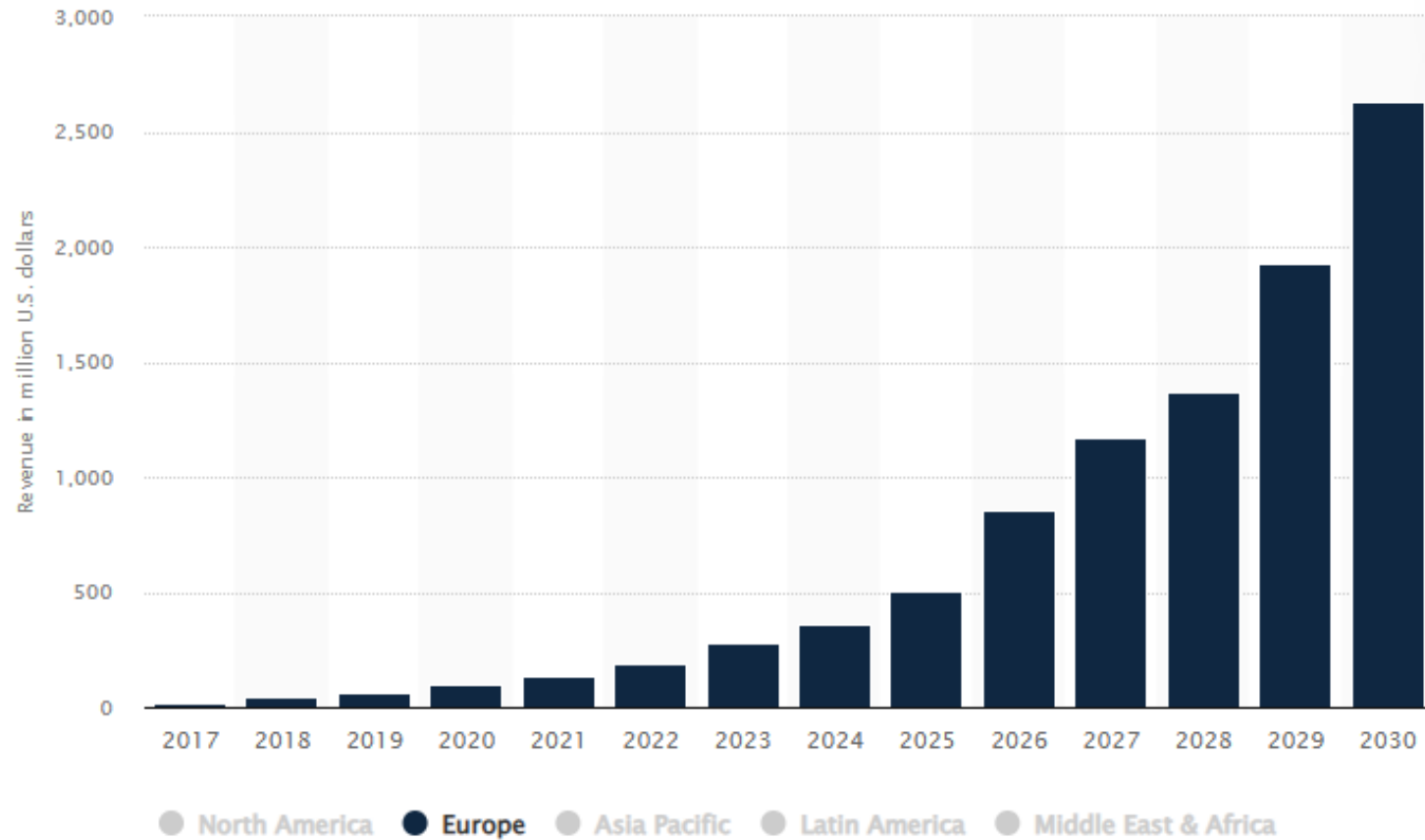
- Make Europe a quantum powerhouse by fostering a resilient, sovereign quantum ecosystem
- Fuel startup growth
- Transform breakthrough science into market-ready applications



Quantum

Europe Market from 2017 to 2030

- The market size in the Quantum market is projected to reach US \$850mn in 2026.
- The market size is expected to show an annual growth rate (CAGR 2025-2030) of roughly 40%, resulting in a market volume of US \$2.6bn by 2030.
- It is expected to accelerate rapidly after 2026, with the market more than doubling between 2028 and 2030.

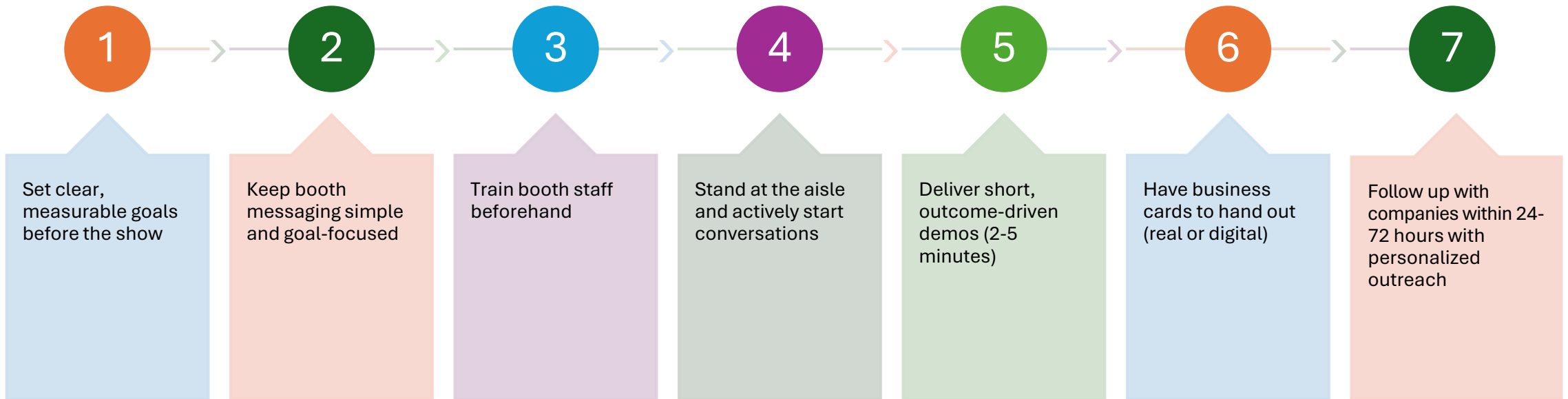


Quantum *Germany*

- Germany has regional quantum hubs and shows their main technology strengths, for example: photonic and ion-trap quantum computing, quantum software, quantum sensing, and quantum communication/networking.
- Examples: Berlin Quantum, Quantum BW, Munich Quantum Valley
- Quantum is involved in groundbreaking research in Germany in regard to climate change, battery recycling, and fighting cancer.



Trade Show Best Practices



Germany presence at CES

- One of the largest U.S. Commercial Service International Delegations
- Germany was one of the top countries in attendance at CES 2024!
- Many German exhibitors are represented at CES with their own booths, at the German pavilion or at other joint booths
- CES attracts high German Government officials & staff

Delegation leader from the Commercial Service in Germany:

Michael Emde – Michael.Emde@trade.gov



Questions?

Thank you for your attention!

Contact: shari.stout@trade.gov
www.trade.gov/germany



ITALY

Commercial Landscape Briefing

Valentina Massari
Commercial Specialist
Milan, Italy



INTERNATIONAL
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**U.S.
COMMERCIAL
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United States of America
Department of Commerce



Italy Overview



Government: Parliamentary Republic

President: Sergio Mattarella (since Feb 2015, re-elected 2022)

Prime Minister (President of Council of Ministers): Giorgia Meloni (since Oct 2022)

Coalition government: Fratelli d'Italia (far right), Lega (far right), Forza Italia (center-right)

Major cities: Rome (capital), Milan, Naples, Turin, Palermo

Regions: 20 administrative regions

Population: 59 million (declining, aging); 72% urban

Land: similar size to AZ, 2x GA; 46% agricultural, 32% forest; industrial north, agrarian south

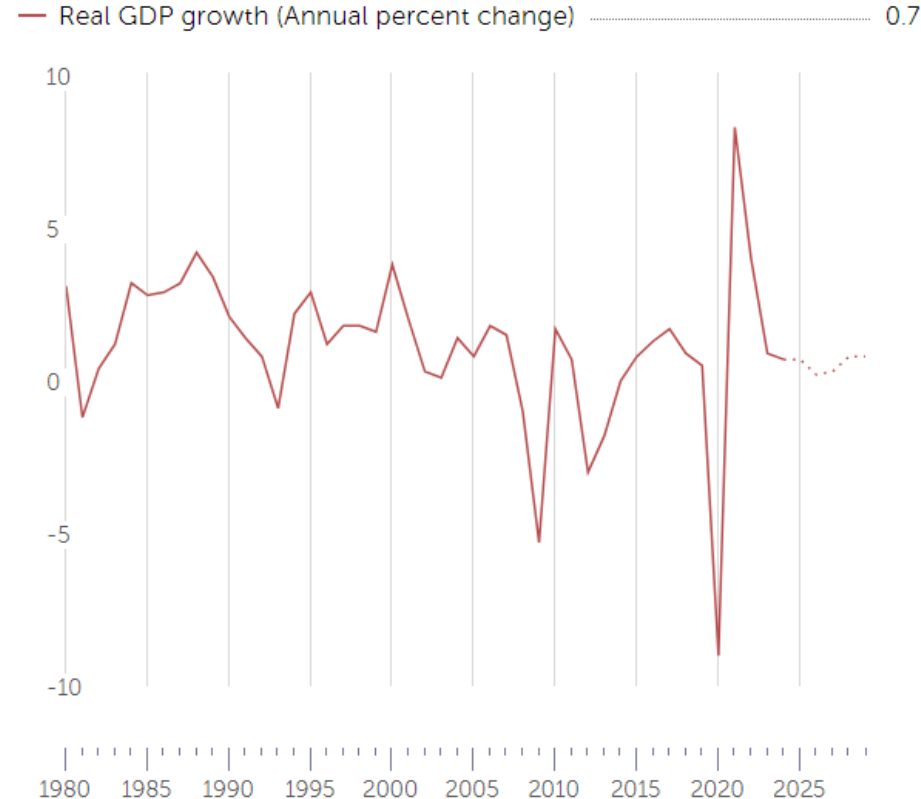


Main International Memberships



Overview - Economy

IMF DataMapper, April 2024



Real GDP:

- (2023) \$2.2 trillion; \$35,700 per capita
- (2024) \$2.37 trillion; \$40,226 per capita
- 8th largest economy
- 3rd largest in EU
- Italy is the 2nd largest manufacturing country in the EU (after Germany)

GDP growth:

- 4.0% (2022)
- 0.9% (2023)
- 0.7% (2024)
- 0.6%-0.8% (2025)

Inflation:

- 1.1% in 2024 (5.9% in 2023)
- 11.8% (Oct/Nov 2022 peak)

Unemployment:

- Overall: 7.2% (Mar 2024)
- Overall: 6.0% (July 2025)*
- Youth (< 25): 20.1% (2024)
- Youth (< 25): 18.7% (July 2025)
- Highest in southern Italy

Overview - Trade

2024 bilateral trade highlights

- 2-way trade in goods and services was **\$108.7 billion**.
- Italy is **U.S. 16th** largest export market (**6th in EU**).*
- **U.S. exports** concentrated in **high-value sectors** – **oil & gas, pharma & medicines, precious metals, and aircraft products & parts**.
- U.S. is **Italy's 2nd** largest export market with over 10% of all goods exports and over 20% of all non-EU exports.
- Italy is U.S.' **11th** largest globally (**2nd in EU**) source of imports.
- Major U.S. imports include **pharma & medicines, machinery, motor vehicles, wine, footwear, jewelry, and leather goods**.

US-Italy Merchandise Trade (2024)

Total trade: \$108.7 billion

U.S. exports to Italy: \$32.4 billion

U.S. imports from Italy: \$76.3 billion

Bilateral trade deficit: \$43.9 billion

Key Sectors for US Exports



Medical Devices



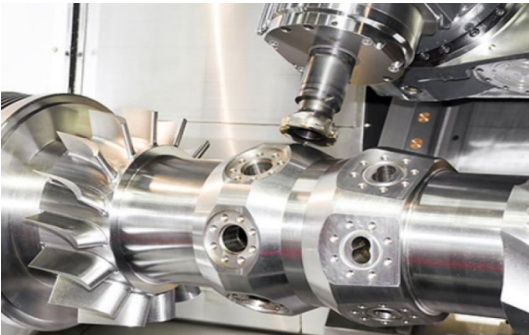
Digital Technologies



Energy



Environmental Technologies



Advanced Manufacturing



Security/Aviation/Defense

Italian Delegation at CES 2026

- ❖ Over 60 Italian companies registered in the Italian delegation
- ❖ Italian companies show strong interest in U.S. products. The United States is considered as a leader in digital solutions
- ❖ Spin-off with Technical Visits



Industrial Sectors Represented by the Italian Delegation

1. Advanced Manufacturing & Industrial Production
2. ICT, Software & Digital Services
3. Energy, Construction & Smart Buildings
4. Communication, Media & Creative Industries
5. Research, Innovation & Technology Transfer
6. Public Sector & Healthcare Digitalization
7. Sustainability & Circular Economy



Innovations and Technologies of Interest to Italian Companies

- Advanced Software & Digital Platforms
- Artificial Intelligence & Automation
- Cybersecurity & Secure Infrastructure
- Smart Machinery & User-Friendly Technologies
- Industry 4.0 / 5.0 Solutions
- Energy Efficiency & Clean Technologies
- AI Entertainment & Social Gaming



Please contact me:

Valentina Massari

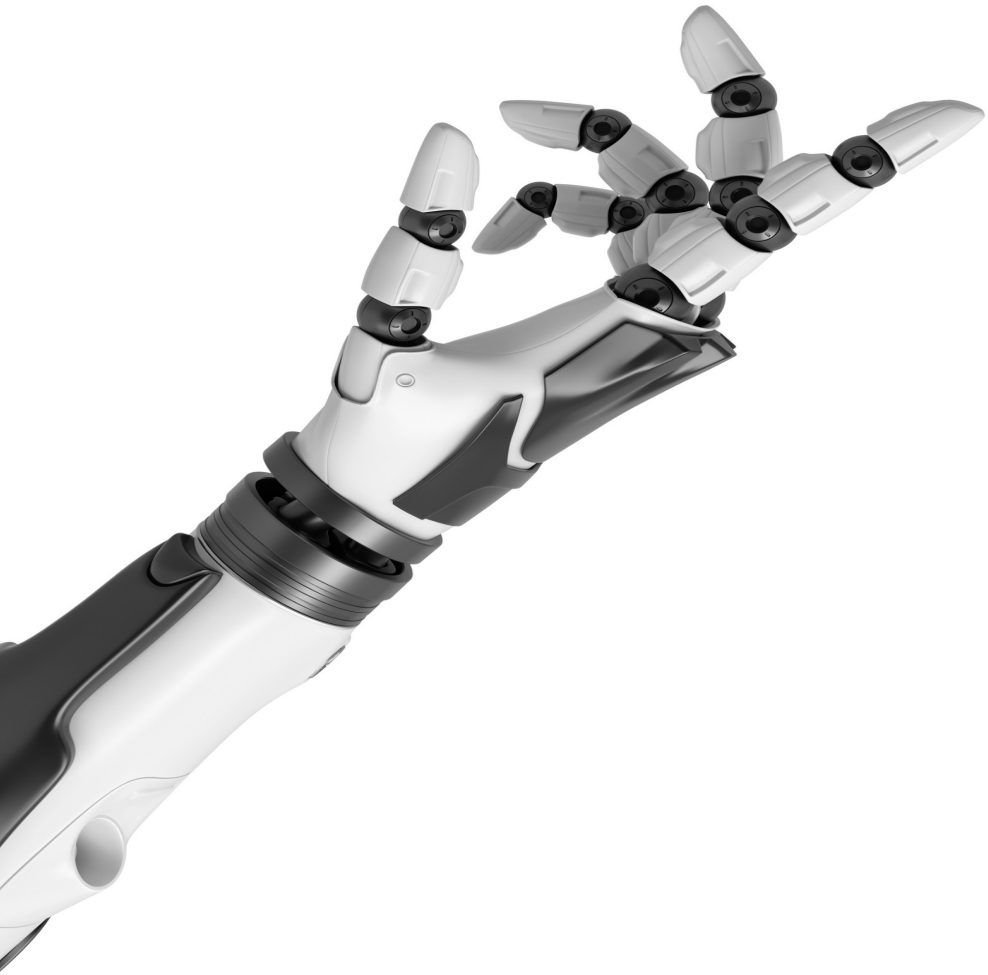
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Via Principe Amedeo, 2 | 20121 Milano, Italy

Tel: +39 02 6268 8507 (direct) | Email: valentina.massari@trade.gov

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9AM – 6PM T - Th

9AM – 4PM F



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U.S. COMMERCIAL SERVICE Overview

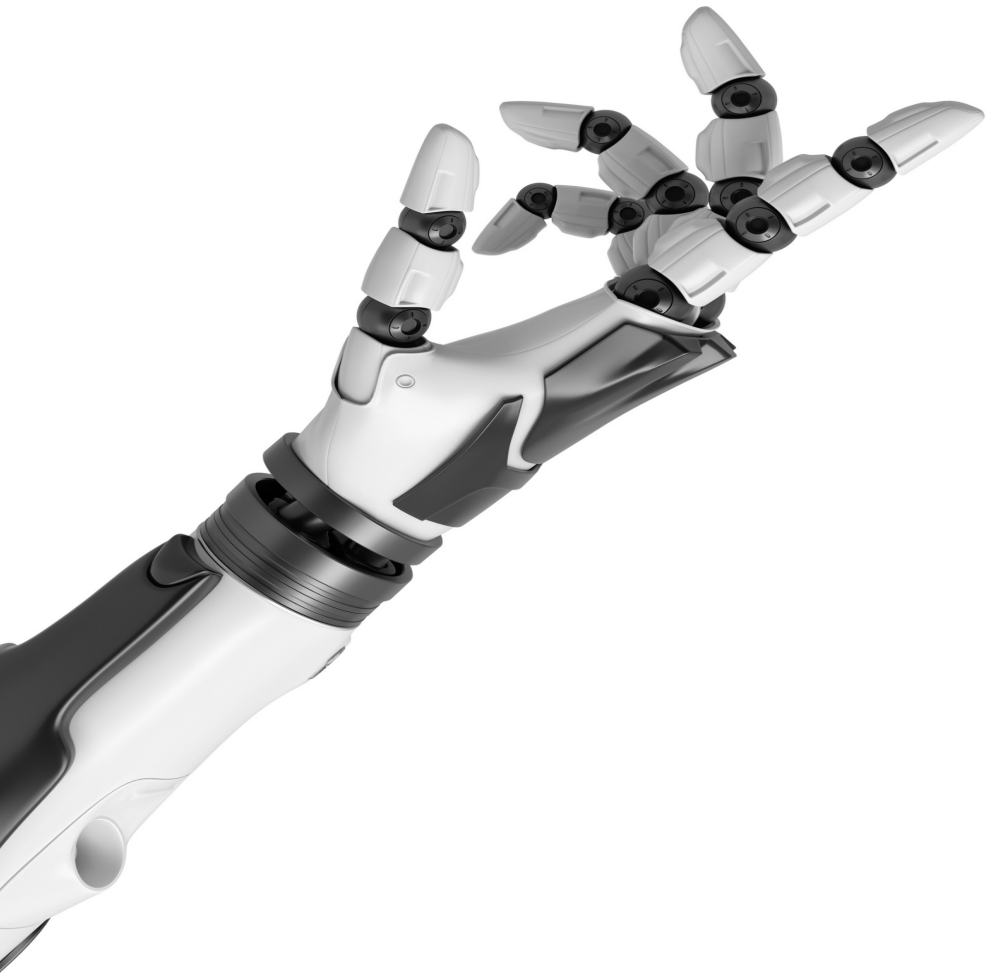
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Thank you!



At 9AM Eastern Time





Q&A

Contact Us!

Crystal.Mills@trade.gov

Colin.Hudson@trade.gov



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