


A faint, light green outline map of Europe serves as the background for the entire page.

# THE PROMOTIONAL ITEM MARKET IN EUROPE 2019



# **Achieving a fully compliant, ethical and sustainable product media industry along the whole value chain by 2023.**

Sustainability is an important subject in the promotional product market. The production conditions and the materials or ingredients used play a major role in this. Traders, and especially manufacturers, take their social responsibility very seriously and increasingly aligning themselves towards “green products”. Many manufacturers and suppliers regard sustainability certification as a necessity.

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# Promotional items in the marketing mix highly effective advertising classics

**Promotional items – everyone likes them. You will not find many people who do not have any promotional items at home. Ballpoint pens, notepads, coffee cups or the classic umbrella, everybody gets a little “give-away” at some point. Companies have already been using promotional items for decades to stay permanently in the customer’s memory.**

Compared with advertising in traditional media or online media, such as the social media channels, haptic promotional products are not only visible, but also tangible and have practical value. This way you can make customers remember corporate logos, strengthen the bond to the company and encourage willingness to buy.



For companies, promotional products are an important medium for purposefully gaining the customers’ attention. For example, 84% of end users can name the company promoted by the received item. (Source: ASI Impression Study)

In addition to this, promotional products are an efficient marketing instrument. When they are strategically and conceptually integrated, and tailored to the target group, they can unfold their full potential. 78 percent\* of the recipients of advertising items are willing to recommend the company. Provided the promotional products are of high quality. Inferior quality makes a negative impression on the recipient and shows the company in a poor light.

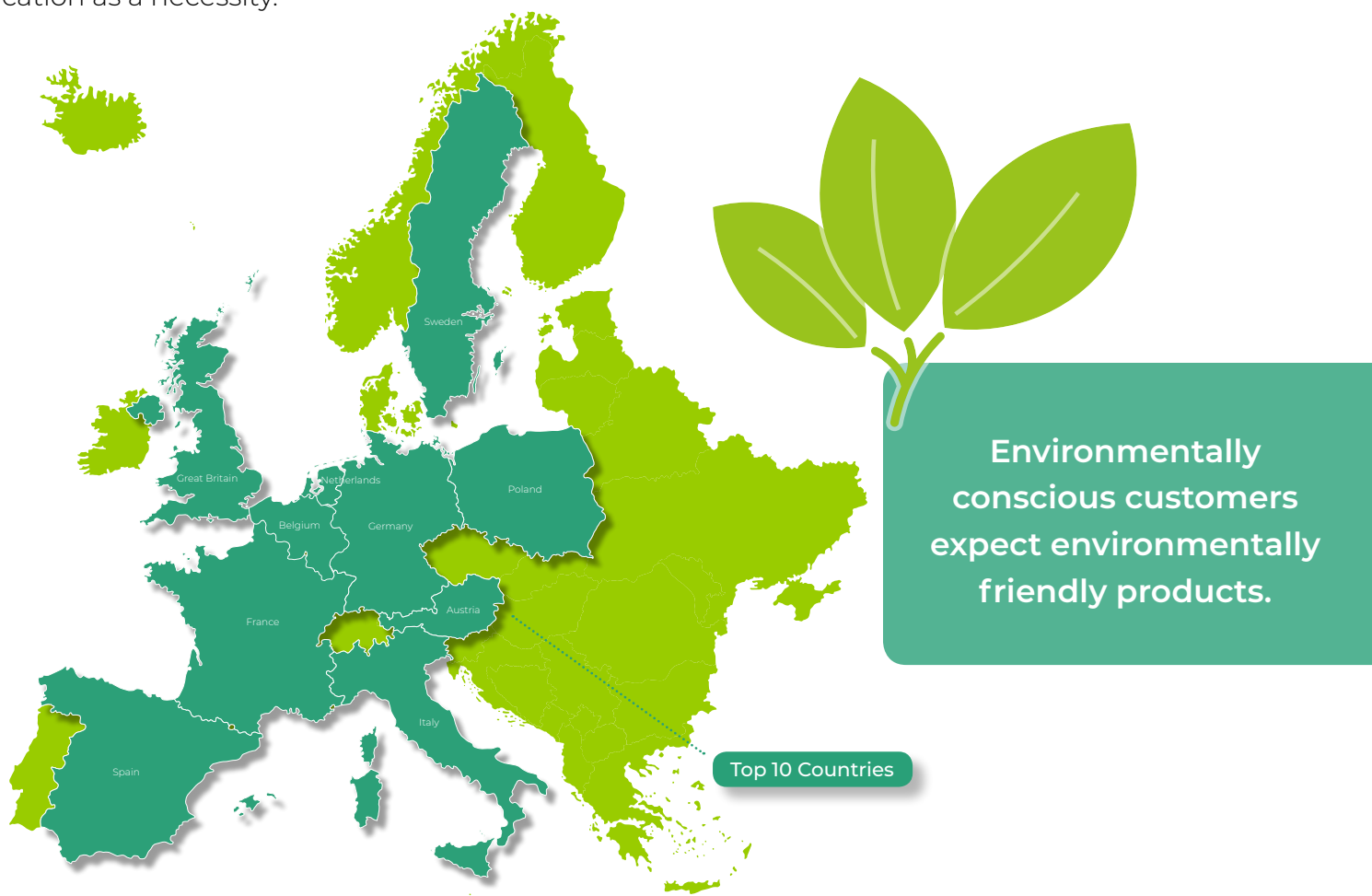


**“Nowadays – in the age of digital reproducibility and arbitrariness – people are looking for things that they can experience in a real and multi-sensory way”**

Michael Freter

Managing Director of Promotional Product Service Institutes (PSI).

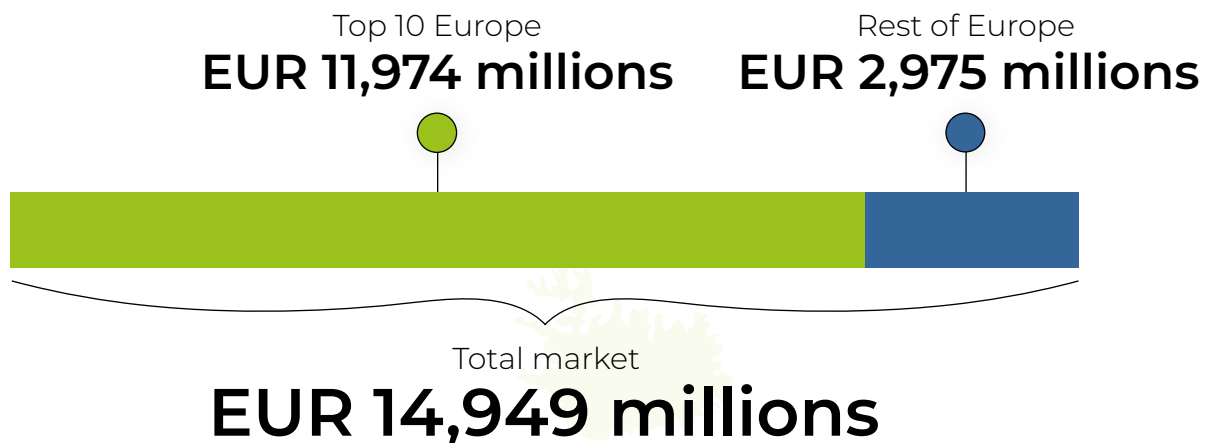
Sustainability is an important subject in the promotional product market. The production conditions and the materials or ingredients used play a major role in this. Traders, and especially manufacturers, take their social responsibility very seriously and are increasingly aligning themselves towards “green products”. Many manufacturers and suppliers regard sustainability certification as a necessity.



Do the different countries have particular characteristics in the context of expenditure on promotional products? What meaning do which promotional items have in the respective top 10 countries in Europe?

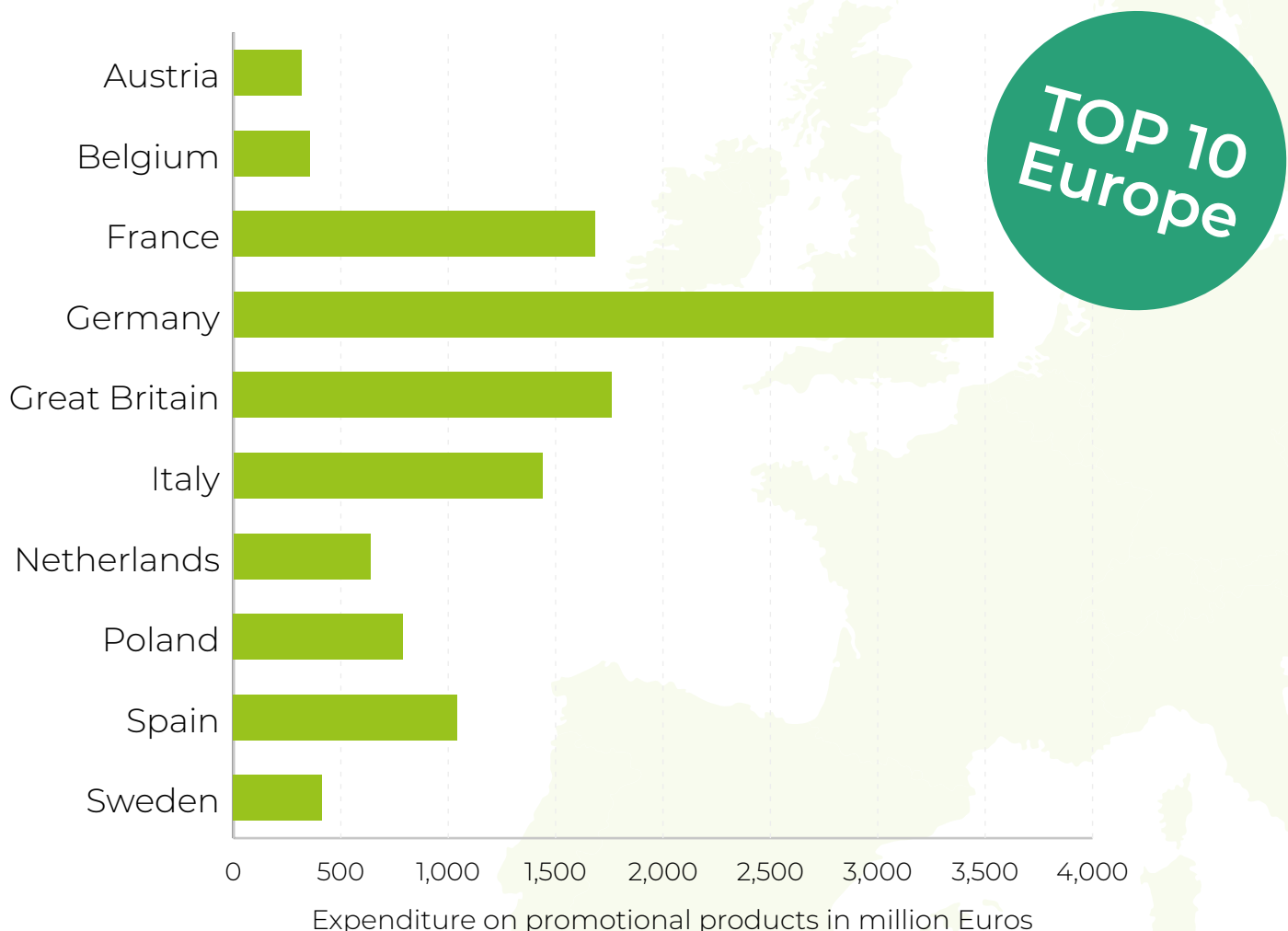
To answer these and other questions, techconsult carried out a comprehensive study in Europe's top 10 countries on behalf of the Promotional Product Service Institute.

# The promotional product market in Europe



Of the expenditure on promotional products in the whole of Europe, the top 10 countries make up a share of 80 percent. The other nations account for 20 percent.

Germany is the biggest market with a 24 percent share of the total expenditure in Europe. It is followed, much further behind, by Great Britain (12 percent) and France (11 percent).





## Europe

The promotional product industry is booming. An analysis of expenditure on advertising over the past few years has shown: From year to year, companies in Europe spend more money on promotional items. 15 billion euros were invested into promotional products in Europe in 2018.



# 40%

*of expenditure was carried out by companies with up to 9 employees.*

Finding the right promotional products is a big challenge for every company, because it has to fulfil two functions: pleasing the customer and representing the company. In addition to this, many manufacturers and suppliers are showing themselves to be increasingly environmentally aware by producing and manufacturing sustainably and having their products certified for sustainability.



Annual spendings  
**EUR 14,949**  
millions

**“Sustainability is more and more important! Suppliers take their social responsibility more seriously than other types of companies and strive for sustainable quality.”**

*Marc Rugi of BIC Graphic*

The promotional product industry is an innovative industry. It is customer-oriented and has to have its finger on the pulse in order to be able to offer its customers the right promotional products. This pays off: The sales of the promotional product industry are at a stable high level. The available pallet of promotional items is extensive. The most in-demand are currently clothing, followed by electronic and multimedia items. Office items occupy third place.

**Sustainability  
is in demand**

# Europe Top 10

The highest-selling countries are:

Austria, Belgium, France, Germany, Great Britain, Italy, Netherlands, Poland, Spain and Sweden

In 2018, the companies of the top 10 countries in Europe invested just under 12 billion euros in promotional products. That is 80 percent of the total European promotional product market. On average, it is equivalent to annual expenditure of 62 euros per person in employment. The majority of the expenditure, 5.2 billion euros, was carried out by companies with 50 or more employees.



Annual spendings  
**EUR 11,974** millions



Spendings per  
employee

**EUR  
62**



Group of promotional products

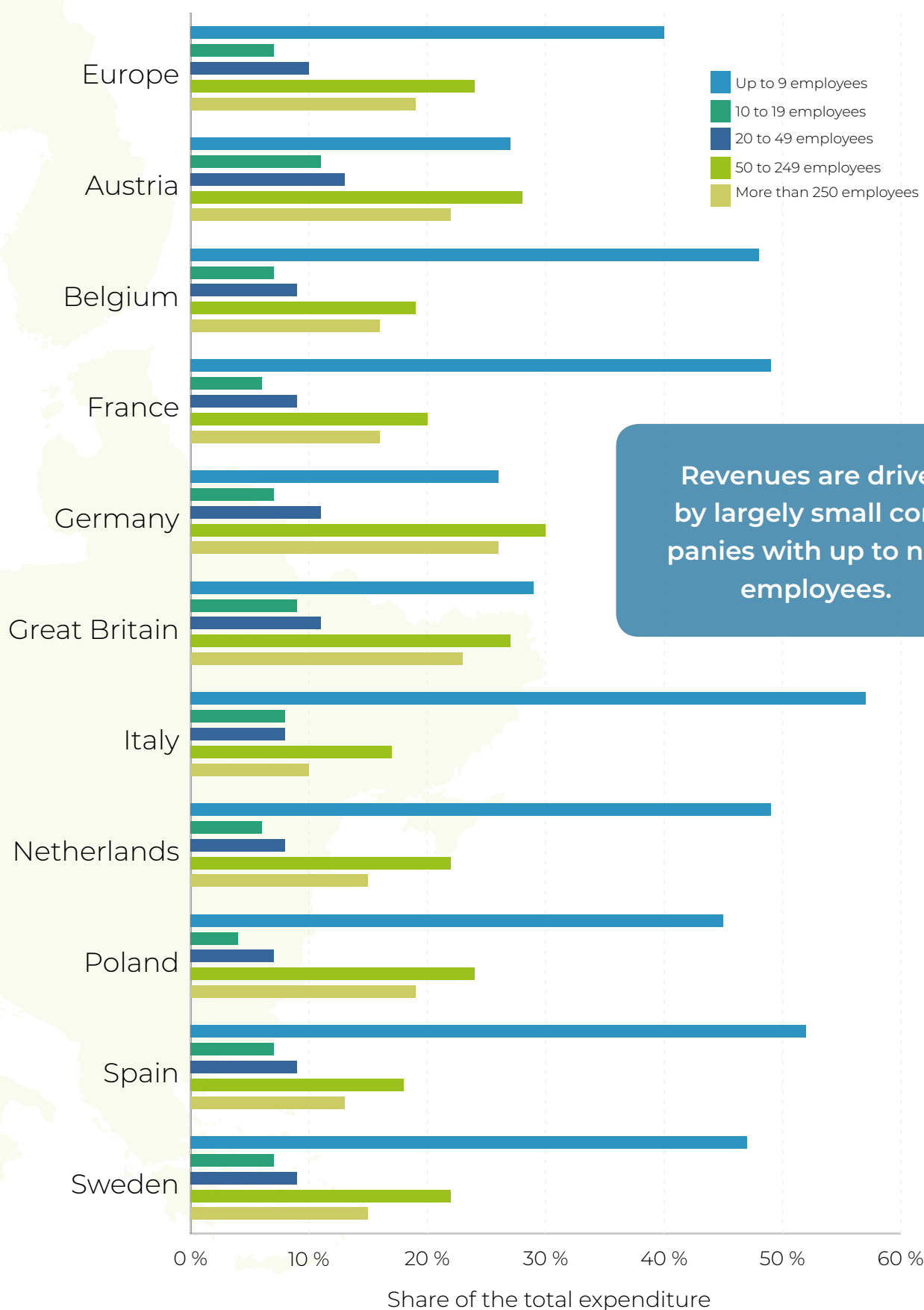
Spendings in promotional products  
(m €) \*\*

Apparel & Textiles		2,326
Electronics & Multimedia		1,907
School & Office		1,833

Bags, Luggage & Travel	1,265
Lifestyle & Accessories	862
Food & Beverage	816
Sports, Leisure & Events	704
Home & Living	667
Services & Technologies	594
Beauty & Health	316
Games & Toys	275
Garden & Outdoors	235
Home Improvement	173



## Comparison of size classes



# Austria

In Austria, 315 million euros flowed into the promotional product industry. The majority of this, 28 percent, is accounted for by the companies with 50 to 249 employees.



27 percent is contributed by the small companies with up to 9 employees. The expenditure per person in employment in Austria is 70 euros. This is a very high level: 8 euros above the average value of the top 10.



Annual spendings  
**EUR 315** millions

Spending per  
employee

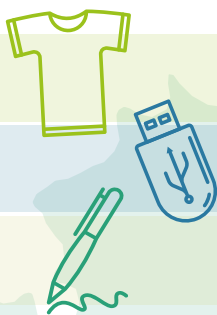
**EUR  
70**



Group of promotional products

Spending in promotional products  
(m €) \*\*

Apparel & Textiles	61
Electronics & Multimedia	50
School & Office	48



Bags, Luggage & Travel	33
Lifestyle & Accessories	23
Food & Beverage	22
Sports, Leisure & Events	19
Home & Living	18
Services & Technologies	16
Beauty & Health	8
Games & Toys	7
Garden & Outdoors	6
Home Improvement	5

# Belgium

With 355 million euros of expenditure for promotional products, Belgium is in ninth place among the top 10 countries. 171 million euros of this goes on the budget of companies with up to nine employees. The average expenditure per person in employment is 70 euros and is thus clearly above the average of the top 10 of 62 euros. This concerns the whole range of promotional items. 19 euros per person in employment are invested in textile promotional items, 16 euros in electronics, and 15 euros per head in office equipment and writing tools.



Annual spendings  
**EUR 355 millions**

Spendings per  
employee

**EUR  
70**



Group of promotional products	Spendings in promotional products (m €) **
Apparel & Textiles	69
Electronics & Multimedia	57
School & Office	54

Bags, Luggage & Travel	38
Lifestyle & Accessories	26
Food & Beverage	24
Sports, Lesure & Events	21
Home & Living	20
Services & Technologies	18
Beauty & Health	9
Games & Toys	8
Garden & Outdoors	7
Home Improvement	5

# France

France is in third place in the ranking of the top 10. Companies in France spend 1.69 billion euros on promotional items. The greater part of this, 828 million euros, is spent by companies with up to 9 employees. This is equivalent to a share of just under 50 percent. In a comparison between the countries, the French companies are more thrifty than average in their per-person expenditure. An average of only 57 euros per head is spent here. That is 27 euros less than in Germany. The picture is similar when it comes to product affinity: textiles are out in front of electronics.



Annual spendings  
**EUR 1,685** millions

Spending per  
employee

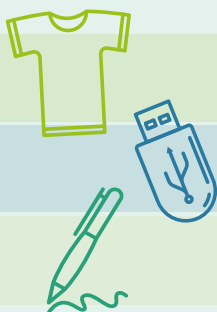
**EUR  
57**



Group of promotional products

Spending in promotional products  
(m €) \*\*

Apparel & Textiles	327
Electronics & Multimedia	269
School & Office	258



Bags, Luggage & Travel	178
Lifestyle & Accessories	121
Food & Beverage	115
Sports, Leisure & Events	99
Home & Living	94
Services & Technologies	84
Beauty & Health	45
Games & Toys	39
Garden & Outdoors	33
Home Improvement	24

# Germany

Germany is the biggest market in Europe for advertising items. 3.54 billion euros were invested in promotional items in 2018. An increase in sales of 2% was registered against 2017. The sales are generated by around 4,000 German companies with approx. 60,000 jobs. (Source: GWW) In Germany, according to the General Association of the Advertising Industry (GWW), promotional items occupy second place, immediately behind TV advertising, beating even print, outdoor, radio and online advertising. 98 percent of all Germans from the age of 14 possess at least one promotional item. The practical value of promotional items is undisputed, because nine out of ten owners also use them. (Source: GWW)



**Annual spendings**  
**EUR 3,538 millions**




**Spendings per employee**

**EUR 84**



**Group of promotional products**

**Spendings in promotional products  
(m €) \*\***

<b>Apparel &amp; Textiles</b>		<b>687</b>
<b>Electronics &amp; Multimedia</b>		<b>564</b>
<b>School &amp; Office</b>		<b>542</b>

Bags, Luggage & Travel	<b>374</b>
Lifestyle & Accessories	<b>255</b>
Food & Beverage	<b>241</b>
Sports, Lesure & Events	<b>208</b>
Home & Living	<b>197</b>
Services & Technologies	<b>176</b>
Beauty & Health	<b>94</b>
Games & Toys	<b>81</b>
Garden & Outdoors	<b>70</b>
Home Improvement	<b>51</b>

# Great Britain

Great Britain is in second place in the top 10 with its expenditure on promotional products. The companies there invest 1.76 billion euros in promotional items. 30 percent of the expenditure is carried out alone by small companies with up to 9 employees. 23 percent is accounted for by companies in the size category from 250 employees. In a country comparison, the per capita expenditure of 54 euros is substantially below the average. 11 euros per person in employment goes on textiles. 9 euros on electronics and 8 euros on office items.



Annual spendings  
**EUR 1,762** millions




Spending per  
employee

**EUR  
54**



Group of promotional products

Spending in promotional products  
(m €) \*\*

Apparel & Textiles		342
Electronics & Multimedia		281
School & Office		270

Bags, Luggage & Travel	186
Lifestyle & Accessories	127
Food & Beverage	120
Sports, Leisure & Events	104
Home & Living	98
Services & Technologies	87
Beauty & Health	47
Games & Toys	40
Garden & Outdoors	35
Home Improvement	26



# Italy

The promotional product budgets of companies in Italy amount to 1.44 billion euros. Italy occupies fourth place in the top 10.

The majority of the expenditure, 57 percent, is carried out just by small companies with up to 9 employees.

In a comparison of the top 10 countries, the per capita expenditure, at 57 euros, is five euros below the average value of 62 euros.



Annual spendings  
**EUR 1,439** millions

Spending per  
employee

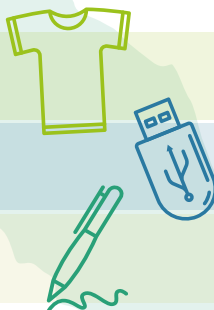
**EUR  
57**



Group of promotional products

Spending in promotional products  
(m €) \*\*

Apparel & Textiles	279
Electronics & Multimedia	229
School & Office	220



Bags, Luggage & Travel	152
Lifestyle & Accessories	104
Food & Beverage	98
Sports, Leisure & Events	85
Home & Living	80
Services & Technologies	71
Beauty & Health	38
Games & Toys	33
Garden & Outdoors	28
Home Improvement	21

# Netherlands

Companies in the Netherlands spend 637 million euros on promotional items, and a total of 312 million euros of this is accounted for by companies with up to 9 employees. This is equivalent to a share of just under 50 percent. The share of expenditure on promotional items is only 5 percent of the top 10 total. In a country comparison of expenditure per person in employment, however, the country is in third place with 71 euros, substantially above the average value of the top 10 of 62 euros. Per person in employment, 14 euros are spent on textile items and 11 euros each on electronics items and office supplies.



Annual spendings  
**EUR 637 millions**

Spending per  
employee

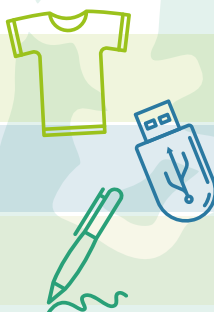
**EUR 71**



Group of promotional products

Spending in promotional products  
(m €) \*\*

Apparel & Textiles	124
Electronics & Multimedia	101
School & Office	97



Bags, Luggage & Travel	67
Lifestyle & Accessories	46
Food & Beverage	43
Sports, Leisure & Events	37
Home & Living	36
Services & Technologies	32
Beauty & Health	17
Games & Toys	15
Garden & Outdoors	13
Home Improvement	9

# Poland

In Poland, companies spend 789 million euros on promotional products. This is equivalent to 7 percent of the top 10 total. Like Spain, Poland has a very low level of per capita expenditure. The average for a person in employment is only 47 euros.



Annual spendings  
**EUR 789** millions




Spendings per  
employee

**EUR 47**



Group of promotional products

Spendings in promotional products  
(m €) \*\*

Apparel & Textiles		153
Electronics & Multimedia		126
School & Office		121

Bags, Luggage & Travel	84
Lifestyle & Accessories	57
Food & Beverage	54
Sports, Lesure & Events	47
Home & Living	44
Services & Technologies	39
Beauty & Health	21
Games & Toys	18
Garden & Outdoors	16
Home Improvement	11

# Spain

With an expenditure of 1.04 billion euros, the companies in Spain are in the midfield of the top 10. The per capita level of advertising expenditure is nevertheless very low. The average expenditure per person in employment is only 46 euros, way below the top 10 average of 62 euros. This applies to the whole range of promotional items, even favourites like textiles and electronics items. On average, only 9 euros per person in employment is spent on textile promotional items and only 7 euros on electronics.



Annual spendings

EUR **1,041** millions




Spending per employee

EUR **46**



Group of promotional products

Spending in promotional products  
(m €) \*\*

Apparel & Textiles		202
Electronics & Multimedia		166
School & Office		159

Bags, Luggage & Travel	110
Lifestyle & Accessories	75
Food & Beverage	71
Sports, Leisure & Events	61
Home & Living	58
Services & Technologies	52
Beauty & Health	28
Games & Toys	24
Garden & Outdoors	20
Home Improvement	15

# Sweden



The promotional product budgets of companies in Sweden amount to 412 million euros. 195 million euros of this is spent by companies with up to 9 employees.

In a country comparison of per capita expenditures, Sweden is in second place behind Germany. An average of 78 euros is spent on promotional products per person in employment. Here too, the preferred items are textiles, followed by electronics and office supplies.



Annual spendings  
**EUR 412 millions**




Spendings per  
employee

**EUR 78**



Group of promotional products

Spendings in promotional products  
(m €) \*\*

Apparel & Textiles		80
Electronics & Multimedia		66
School & Office		63

Bags, Luggage & Travel	44
Lifestyle & Accessories	30
Food & Beverage	28
Sports, Lesure & Events	24
Home & Living	23
Services & Technologies	20
Beauty & Health	11
Games & Toys	10
Garden & Outdoors	8
Home Improvement	6

## Further information and contact



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### About tech**consult** GmbH

The tech**consult** GmbH, founded in 1992, is one of the established analyst houses in Central Europe. The focus of the strategy consulting lies in the information and communications industry (ICT). Through years of standard and individual studies, techconsult has an unparalleled information base in the German-speaking realm, both in terms of continuity and depth of information, making it an important consulting partner for CXOs and the IT industry when it comes to product innovation, marketing strategy and sales development.

### Impressum

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### About PSI

With more than 6,500 members, the Promotional Product Service Institute (PSI) is Europe's largest network of companies in the promotional products industry. Member companies include manufacturers, importers, distributors, consultants and agencies.

More information: [www.psi-network.de](http://www.psi-network.de)

\*\* The country markets and their distribution among the product segments are generated from a market model based on a supplier survey. The calculation of the pan-European market and the distribution of the pan-European market among the product segments also apply in this market model to derivatives and distribution keys within the countries. An upcoming update of the market model this year through a European customer survey will re-adjust the derivatives and distribution keys.

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