WORLD TRADE ORGANIZATION

WORLD TRADE REPORT 2025

Making trade and AI work together to the benefit of all

What is the World Trade Report?

The World Trade Report is an annual publication that aims to deepen understanding about trends in trade, trade policy issues and the multilateral trading system.

What is the 2025 Report about?

The 2025 World Trade Report explores the complex and fast-evolving relationship between arti cial intelligence (AI) and international trade and how this relationship may shape inclusive growth. It also looks at the central role the WTO can play in ensuring that AI supports broad-based growth.

Find out more

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ABBREVIATIONS

AI	artificial intelligence
AIoT	Artificial Intelligence of Things
AGI	artificial general intelligence
AI-TPOI	AI Trade Policy Openness Index
CPC	Cooperative Patent Classification
DSU	Dispute Settlement Understanding
DTI	Digital Trade Integration database
GATS	General Agreement on Trade in Services
GATT	General Agreement on Tariffs and Trade
GDP	gross domestic product
GPA	Agreement on Government Procurement
GPU	graphics processing unit
GSP	Generalized System of Preferences
HS	Harmonized System
ICC	International Chamber of Commerce
ICT	information and communication technology
IEA	International Energy Agency
IEC	International Electrotechnical Commission
IEEE	Institute of Electrical and Electronics Engineers
IFD	Investment Facilitation for Development
ILO	International Labour Organization
IoT	Internet of Things
IP	intellectual property
ISO	International Organization for Standardization
IT	information technology
ITA	WTO Information Technology Agreement
ITU	International Telecommunication Union
LDC	least-developed country
LLM	large language model
MFN	most-favoured nation
MNE	multinational enterprise
MSME	micro, small and medium-sized enterprise
MW	Megawatt
NLP	natural language processing
OECD	Organisation for Economic Co-operation and Development
QR	quantitative restriction
R&D	research and development
RTA	regional trade agreement
S&DT	special and differential treatment
SCM	subsidies and countervailing measures

SPS	sanitary and phytosanitary
STEM	science, technology, engineering and mathematics
STRI	World Bank–WTO Services Trade Restrictiveness Index
TBT	technical barriers to trade
TFA	WTO Trade Facilitation Agreement
TRIPS	trade-related aspects of intellectual property rights
UN	United Nations
UNCTAD	UN Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
WIPO	World Intellectual Property Organization
WTO	World Trade Organization

FOREWORD BY THE WTO DIRECTOR-GENERAL

Rapid advances in artificial intelligence (AI) are transforming the world economy, reshaping how work is defined, how value is created, and how opportunities are distributed across societies. Given these far-reaching effects, AI is also transforming world trade. At the same time, rising uncertainty with regard to trade policies threatens to alter the patterns of globalized trade and investment that have underpinned global growth and development for the past several decades. Technological change has always been closely tied to the ways in which people produce and trade goods and services, and this edition of the World Trade Report explores the interaction between trade and the ongoing AI revolution, and what this means for the future of growth and socioeconomic inclusion.

This report builds on earlier WTO research: the World Trade Report 2024, which examined how trade can support inclusive growth, and Trading with Intelligence, our first dedicated study on AI and trade, which was also published in 2024. The World Trade Report 2025 also draws on a joint business survey of the WTO with the International Chamber of Commerce that provides insights into how firms worldwide are leveraging AI in their trade activities. In addition, a new AI Trade Policy Openness Index (AI-TPOI), compiled by WTO economists, offers valuable evidence on trade policies shaping the development and diffusion of AI.

AI has vast potential to lower trade costs and boost productivity, as well as to create new avenues for services production and exports. WTO simulations suggest that the use of AI could boost goods and services trade by nearly 40 per cent by 2040.

However, the effects of the development and deployment of AI are raising concerns that many workers, and even entire economies, could be left behind. Recent decades of globalization delivered major gains for both rich and poor countries, but many people and regions did not share adequately in the benefits. This exclusion has much to do with today's tensions around trade – and it is an experience we cannot afford to repeat with the AI revolution. The central question addressed in the 2025 World Trade Report is whether, and how, AI can serve as a catalyst for inclusive trade-led growth, or whether it could end up widening divides between and within economies.

The message in this report is clear: trade can be a powerful enabler for an inclusive AI transformation. It can help economies to access AI, as well as AI-enabling inputs, to foster the diffusion of innovation, and to unlock new development pathways. But this potential can only be realized if we act deliberately, by closing digital divides, investing in workers, and promoting regulatory coherence.

Today, however, access to AI technologies and the capacity to participate in digital trade remains highly uneven, especially for many low-income economies. Without proactive policy responses and greater international cooperation, AI could deepen inequalities rather than reducing them. But this report

also shows that, with the right mix of trade, investment and complementary policies, AI can create new growth opportunities in all economies.

To explore the potential of AI, WTO economists ran simulations of different scenarios based on whether lower-income economies are able to narrow the gap with the infrastructure and technology levels of higher-income economies. In a scenario in which lower-income economies are unable to catch up, they would see their incomes rise by 8 per cent by 2040, well below the 14 per cent gains of high-income economies. However, in a scenario of partial convergence, in which these economies close their digital infrastructure gap with high-income economies by 50 per cent and adopt AI more widely, their income growth could reach 15 per cent.

The multilateral trading system has long supported development through openness, cooperation, and predictability. It must now rise to meet the challenges and opportunities of the AI era. This means not only ensuring access for all to AI tools and new AI-related markets, but also addressing the problems arising from fragmented regulation of AI, and leveraging trade policy for responsible and inclusive technology use.

At the WTO, we are working to keep pace with these matters. Members are beginning to discuss AI-related trade issues across various bodies, such as in the Work Programme on Electronic Commerce and in the Committee on Technical Barriers to Trade. Initiatives like the joint WTO and World Bank project, "Digital Trade for Africa", and the forthcoming "Digital Trade for Latin America and the Caribbean", support digital development in dozens of economies. The joint WTO Secretariat–International Trade Centre US$ 50 million Women Exporters in the Digital Economy (WEIDE) Fund is helping women in developing economies use digital tools to trade more and trade better. Recent Aid for Trade projects in areas such as transport, infrastructure and agriculture are already incorporating AI, helping beneficiary economies to optimize logistics and manufacturing processes or to promote sustainable farming. Within the WTO Secretariat, I have established a new Digital Trade and Frontier Technologies Hub to strengthen our ability to monitor developments and support members' needs, and to help contribute to inclusive and forward-looking trade policy.

The AI transition is unfolding rapidly. Whether it becomes a force for convergence or for divergence will depend on the choices we make today. With the right frameworks, trade can play a central role in making AI work for all. The WTO is committed to supporting this effort.

Dr Ngozi Okonjo-Iweala
Director-General