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DHL GLOBAL CONNECTEDNESS REPORT 2026

An in-depth analysis of the state of globalization

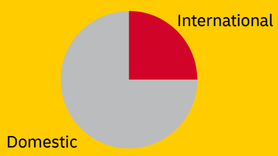
Key Highlights

HOW WE MEASURE GLOBALIZATION

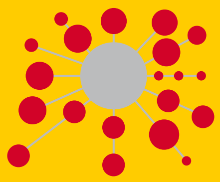
Very often in the public debate, globalization is equated with international trade. In the DHL Global Connectedness Report 2026, we take a broader view by tracking cross-border flows of trade, capital, information, and people.

One way to measure these flows would be to simply track metrics such as the quantity of traded goods, the amount of international investment, or the number of migrants. But a sole focus on such absolute numbers says little about the actual extent of globalization. Should we be afraid of hyper-globalization, for example, if the world's exports reach $50 trillion? If trade shrinks by 10%, does it mean globalization has gone into reverse? We can only answer such questions by putting numbers like these in perspective. We do this in two ways:

Depth
International Flows Relative to Domestic Activity



Breadth
Geographic Distribution of International Flows



We measure the *depth* of international flows: This means we determine how much of a country's trade, capital, information, and people flows are international rather than domestic. In the case of trade, for example, we compare exports to total economic output. This and other ratios help us evaluate the significance of each international flow.

We measure the *breadth* of international flows: This means we evaluate to what extent flows are distributed broadly around the globe rather than concentrated between specific origins and destinations. After all, in a truly globalized world, one would expect countries to trade with a wide variety of nations rather than just a few neighbors.

The DHL Global Connectedness Report 2026 measures the depth and breadth of international flows of trade, capital, information, and people over the period from 2001 to 2025. Our analysis draws on more than 9 million data points across the 14 types of country-to-country flows listed here.

Flow Types Measured by the DHL Global Connectedness Index

Trade
- Goods Trade
- Services Trade

Capital
- Announced Greenfield FDI
- Announced M&A Transactions
- FDI Flows
- FDI Stock
- Portfolio Equity Stock

Information
- Online News Traffic*
- Scientific Research Collaboration
- Charges for Use of Intellectual Property
- International Patenting+

People
- International Travel
- International University Students
- Migrants (foreign born population)

* Country level only + Global trends only

ABOUT THIS BROCHURE

DEAR READER,

At first glance, the world seems to be pulling apart. We are in a period of profound geopolitical and economic uncertainty. The rules-based order is under strain, and volatility has become part of daily decision-making for governments and companies alike. In such an environment, assumptions can be misleading—and facts matter more than ever.

The DHL Global Connectedness Report provides those facts. Now in its fifteenth year, it analyzes more than nine million data points to offer the most comprehensive view of globalization available today.

Despite persistent pressures, this year's findings offer reassurance: globalization is not reversing. It is reshaping and rebalancing, while remaining at a historically high level. Countries and companies continue to adapt with remarkable resilience.

Global trade, for example, grew faster in 2025 than in any year since 2017, excluding the rebound after trade plummeted during the Covid-19 pandemic. Supply chains are extending, too—with traded goods crossing the longest average distances ever recorded. While recent U.S. tariff increases may temper growth in 2026, global goods trade is still projected to expand at an average annual rate of 2.6 percent through 2029, in line with the past decade.

As businesses and economies become more flexible in navigating uncertainty, there are good reasons to remain optimistic about the strength of global flows, despite the risks ahead.

This brochure presents key highlights of the DHL Global Connectedness Report 2026 in a concise overview. For the complete report—with many more insights, analyses, and visualizations, as well as source citations and additional resources—we invite you to visit **dhl.com/gcr**.

We trust you will find the insights compelling and valuable.

Tobias Meyer
CEO, DHL Group

Steven A. Altman
Senior Research Scholar and Director of the DHL Initiative on Globalization, NYU Stern

10 KEY TAKEAWAYS

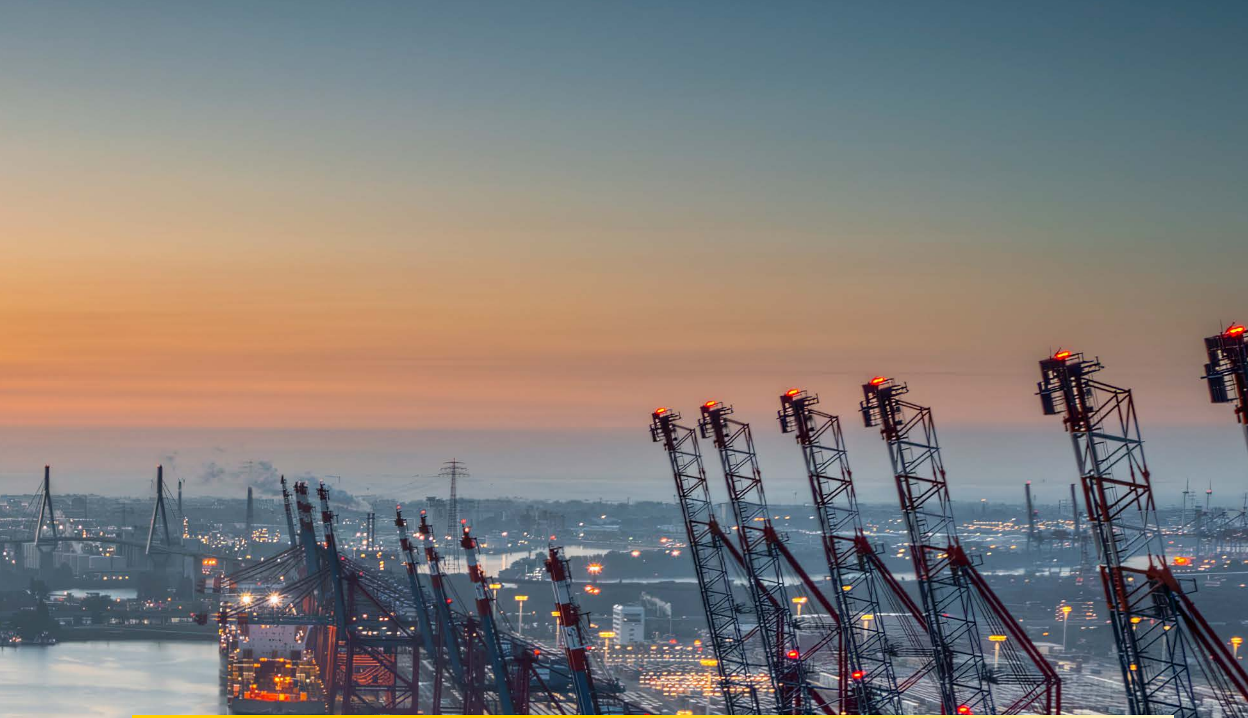
1 **Global connectedness remains stable.** The DHL Global Connectedness Index does not indicate a shift from international to domestic activity across trade, capital, information, and people flows. Global connectedness reached a record high in 2022 and has not changed appreciably through 2025.

2 **Goods trade grew faster in 2025** than in any year since 2017, excluding the volatile Covid-19 pandemic period. U.S. buyers rushed to import goods ahead of tariff hikes, China increased exports to non-U.S. destinations, and investment in AI infrastructure boosted trade in goods such as semiconductors and data transmission equipment.

3 **Trade growth is forecast to continue** over the 2026–29 period at the same average pace as during the past decade. U.S. tariff increases only modestly reduced forecast global trade growth. Other countries supported trade growth by not raising tariffs, and many negotiated new trade deals to secure access to alternative markets.

4 **U.S.–China ties continue to diminish.** Since 2016, the share of U.S. trade, capital, information, and people flows with China has dropped 42%, while China's share with the U.S. is down 37%. However, close allies of the U.S. and China (excluding Russia) show no similar pattern of decoupling from geopolitical rivals.

5 **The share of U.S. imports coming directly from China has fallen** from a peak of 22% in 2017 to 13% in 2024, before plummeting further to only 9% during the first three quarters of 2025. Nonetheless, analysis considering Chinese inputs in goods imported from other countries does not show a clear declining trend in U.S. reliance on content from China.



6 **The world remains far from a split into disconnected geopolitical blocs.** Only 4-6% of global goods trade, greenfield FDI, and cross-border M&A have shifted away from geopolitical rivals over the past decade. Trade flows shifted more toward neutral countries than to close allies, implying more 'de-risking' than 'friendshoring'.

7 **Most international business already occurs among friendly countries,** limiting the threat de-risking strategies pose to globalization. In 2025, only 12% of global goods trade, 5% of greenfield FDI, and 3% of cross-border M&A took place between U.S.-aligned and China-aligned blocs of close allies.

8 **Goods trade and greenfield FDI crossed their longest average distances on record in 2025**, while the shares of these flows occurring within major geographic regions fell to new lows. It remains to be seen whether nearshoring strategies will ultimately lead to more regionalized business patterns.

9 **Singapore is the world's most globally connected country,** followed by Luxembourg and the Netherlands. Singapore has the largest international flows relative to domestic activity, and the United Kingdom has the most broadly distributed flows around the world. The United Arab Emirates achieved the largest increase in global connectedness since 2001.

10 **Prominent narratives about deglobalization** are driven more by politics and public policy than by actual shifts in cross-border flows. While the risk of deglobalization has risen and the pattern of connectedness is shifting, the world overall remains as connected as ever.

GLOBALIZATION AT HISTORICALLY HIGH LEVEL

Amid geopolitical tensions, new tariffs, and dramatic swings in politics, long-standing concerns about the future of globalization have intensified.

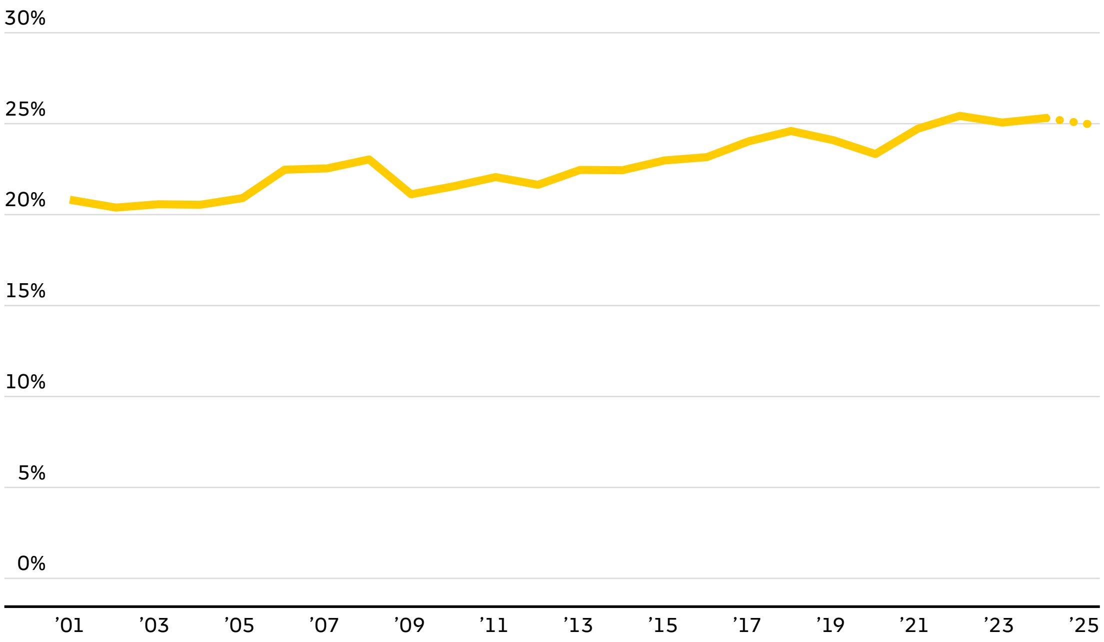
Yet despite all turbulence, international flows of trade, capital, information, and people have remained remarkably resilient. Globalization reached a record high level of 25% in 2022 and remained close to that mark through 2025. Even as the world has become more complex and volatile, it has not become less interconnected.

The figure below depicts the DHL Global Connectedness Index trend that measures international activity relative to domestic activity.

The global results are scaled between 0% (nothing crosses national borders at all) and 100% (a completely globalized "frictionless" world, where borders and distance have ceased to matter).

The current level of 25% also highlights that, even after decades of globalization and its demonstrated resilience, we are still far from a completely globalized world. Without policy constraints, countries still have considerable room to expand their international flows.

DHL Global Connectedness Index Depth Trend, 2001 – 2025*



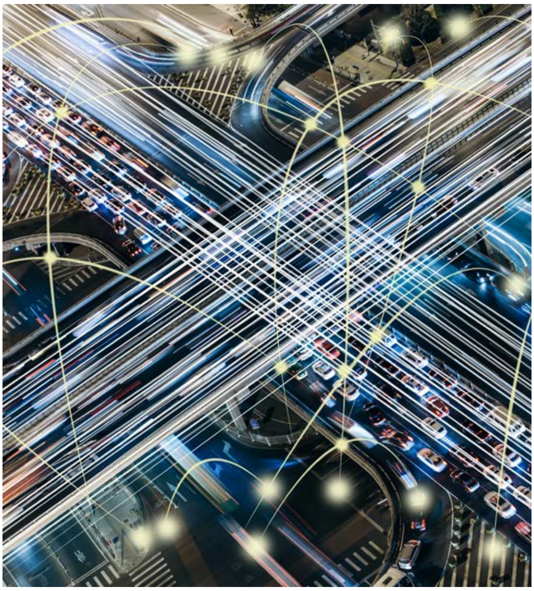
*2025 projected

Note: Scaled from 0% (no flows cross national borders) to 100% (no border or distance effects).

The DHL Global Connectedness Index summarizes globalization based on international flows of trade, capital, information, and people worldwide. Because it focuses on business and economics, trade and capital flows are given more weight (35% each) than information and people flows (15% each).

> *“The risks to globalization are real, but so is the resilience of international flows.”*

FOUR FLOWS THAT CONNECT THE WORLD

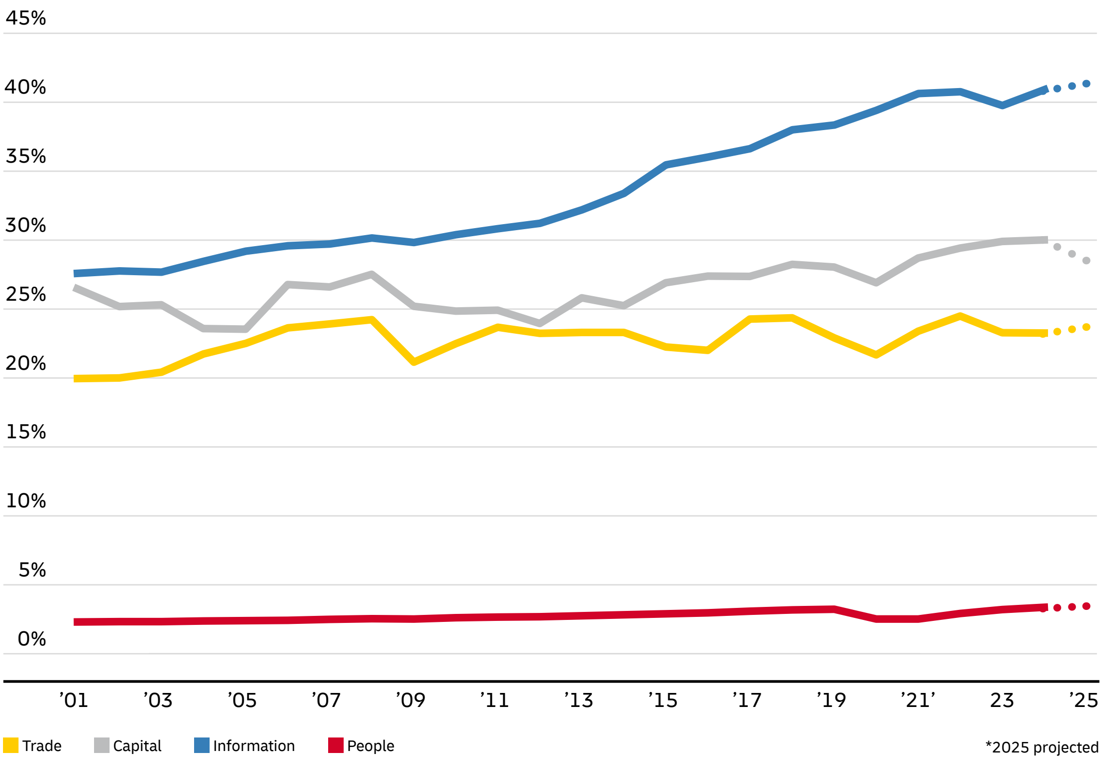


How have recent international tensions and crises affected cross-border flows of trade, capital, information, and people? The figure below depicts how each category of flows developed over the past quarter century.

Information flows have reached the highest globalization levels compared to the other three flow types. Capital flows are second, followed by trade flows. People flows lag far behind, at much lower levels of globalization.

None of the flows shows unusual changes in 2024 or 2025. Since 2023, a decline on the capital pillar has been largely offset by small gains across the trade, information, and people pillars.

DHL Global Connectedness Index, Pillar Depth Trends, 2001 – 2025*



Note: Scaled from 0% (no flows cross national borders) to 100% (no border or distance effects).

For further details on what the four pillars include, please see the inside of the front cover.

TRADE

- Despite turbulence in the trade environment, growth in goods trade was surprisingly robust in 2025 (see Key Takeaways on p. 2).
- Trade's share (combining goods and services trade) of world GDP has remained close to a record high.
- The share of world GDP coming from goods trade has fallen since the 2008 financial crisis, but it has remained stable when China is excluded.
- In contrast, services trade continues its long-term rise as a share of world GDP.

CAPITAL

- International investment trends were mixed in 2025. Overall, there is no general pattern of companies shifting investment from foreign to domestic markets.
- Current data show a decline in announced greenfield foreign direct investment (FDI).
- On the other hand, overall FDI flows increased, cross-border M&A activity was resilient, and multinational firms continue to conduct close to the highest recorded shares of their business abroad.

INFORMATION

- Over the past two decades, information flows have seen the strongest globalization gains.
- Since 2021, however, growth has become slower and more volatile. Data show that international patenting has decelerated, and cross-border scientific collaboration and royalties for the use of foreign intellectual property have both declined.
- Geopolitical tensions and policy restrictions on data flows may now be meaningfully constraining the globalization of information.

PEOPLE

- After collapsing during the Covid-19 pandemic, international people flows have recovered fully, propelling this category of flows to new highs in 2024 and 2025.
- There are long-term rising trends across all types of international people flows measured: travel, student mobility, and migration.
- However, people flows remain far less globalized than flows of trade, capital, or information. Most people seldom travel abroad, and only 3.7% of the world's population lives outside their birth country.

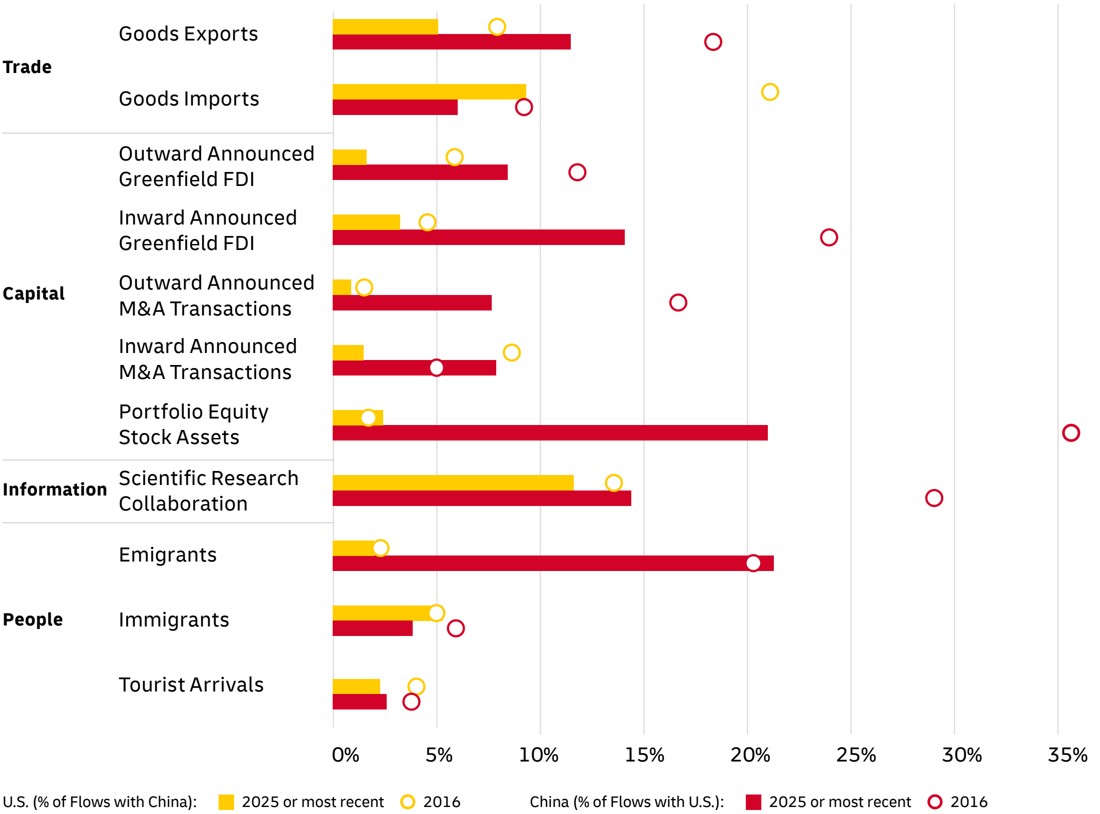
IS THE WORLD FRACTURING INTO RIVAL BLOCS?

Increasing tensions and rivalry between the world's two leading superpowers, the United States and China, pose a serious threat to globalization. Fears have grown that a new cold war could fracture the global economy into rival blocs.

There is, in fact, a decoupling trend between the U.S. and China. The figure below illustrates this—wherever the bars fall short of the circles, flow shares between the two countries have declined. Since 2016, they have reduced the share of their international flows with each other across nearly all types of trade, capital, information, and people flows.

But is there also a similar pattern of separation between rival blocs of countries? Further data indicate that this is not the case—at least not yet—especially if one looks beyond the split between Russia and Western-aligned countries since the full-scale invasion of Ukraine. So far, geopolitical tensions and conflicts have only reshaped a small share of global flows. Most countries continue to engage with their traditional partners, and the world economy remains very far from a wider split into rival blocs.

U.S.–China Flow Shares With Each Other, 2025 (Or Most Recent) vs. 2016

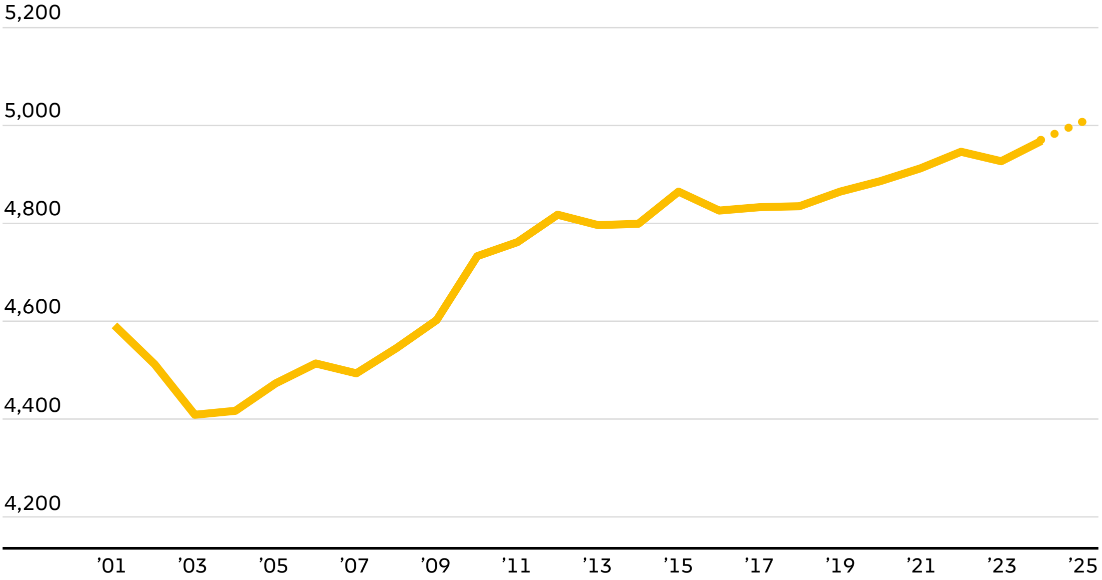


Data sources: Table A.3 in the Appendix of the full report

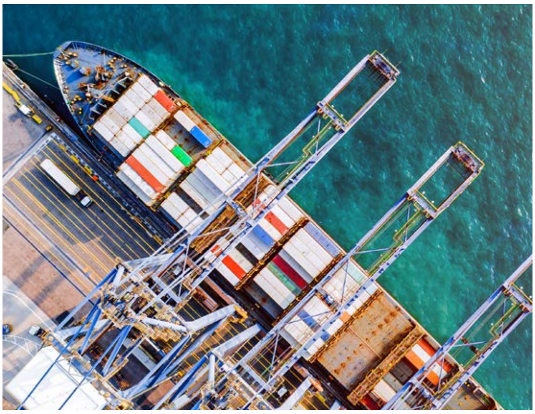
The yellow bars show what percent of the U.S.'s flows with all countries were to or from China (in 2025 or most recent year with data available). The red bars show what percent of China's flows were to or from the U.S. The circles show the same measures as of 2016, before the start of the U.S.–China trade war.

IS THERE A TREND TOWARDS REGIONALIZATION?

Goods Trade: Average Distance (Kilometers), 2001– 2025



Data Sources: IMF International Trade in Goods, China Customs, CPT Single Window, CEPII Gravity. Note: 2025 trade data cover first nine months of the year.



Geopolitical tensions and concerns about supply chain resilience have led many observers to predict a shift from globalization toward regionalization. But is this actually happening? The figure above suggests otherwise. In 2025, traded goods traveled farther than ever—and longer distances indicate less, not more, regionalization.

Most other international flows are also stretching over longer distances—with a declining share happening within regions. This indicates that predictions of a shift from global to regional business have not materialized—at least not yet.

A key driver of international flows extending across greater distances in recent decades has been the rise of emerging economies, which has expanded opportunities for exchange across geographic regions.

Whether international flows will become more regional in the future remains uncertain. Many companies and governments are working to foster regional supply chains, and such reconfigurations can take years to implement. However, international business is already highly regionalized and further regionalization can entail trade-offs, suggesting that a large shift from global to regional business is unlikely.

LEADERS IN GLOBALIZATION

The 2026 edition of the DHL Global Connectedness Report tracks the globalization of 180 countries from 2001 to 2024, based on more than 9 million data points.

The table on the right shows that Singapore ranks as the world's most globalized country, followed by Luxembourg and the Netherlands:

- As a city state with major port operations and a thriving financial sector, **Singapore** is uniquely positioned to excel in globalization. Well before the pursuit of "global city" status became fashionable, Singapore began enacting policies to leverage global connectedness as a cornerstone of its economic development strategy.
- **Luxembourg** is located in the heart of Europe, the world's most connected region, and is particularly active in cross-border capital flows. It is also one of three capitals of the European Union and home to many European institutions. Most Luxembourgers speak four languages and 51% of the country's inhabitants are foreign-born.
- The **Netherlands'** unique combination of geography, regional integration with its neighbors, domestic market attractiveness, and long tradition of international openness have made it a consistent leader in global connectedness.

Further evidence shows that the United Arab Emirates achieved the largest increase in globalization since 2001. Europe is the world's most globalized region, followed by North America and the Middle East & North Africa.

(For rankings in all years, refer to **dhl.com/gcr**)

HOW GLOBALIZED ARE THE WORLD'S 10 LARGEST ECONOMIES?

				Change 2019 to 2024	
GDP	Rank	Country	Score	Rank	Score
1.	39	United States	57	-9	-1
2.	81	China	49	-4	-1
3.	14	Germany	61	0	-1
4.	46	Japan	55	+2	+1
5.	58	India	52	0	0
6.	9	United Kingdom	66	-1	-1
7.	22	France	59	-2	0
8.	28	Italy	58	+5	+1
9.	26	Canada	59	-4	0
10.	60	Brazil	52	+4	+1

This table makes it clear that the world's largest economies, while exerting a powerful influence on worldwide patterns of activity, usually do not rank among the most globalized countries.

This is because, to rank highly on the DHL Global Connectedness Index, countries need to combine high "depth" (large international flows relative to domestic activity) with high "breadth" (widely distributed global flows). Large economies, by contrast, typically show high breadth but low depth, because their large internal markets reduce the relative share of international flows.

For example, the United States ranks 39th overall. Because of the wide reach of its international flows, it ranks second worldwide on breadth. But these international flows are small in relation to domestic activity, which is why it ranks only 131st out of 180 countries on depth. Similarly, China's 81st rank overall reflects a much higher rank on breadth (29th) than depth (177th).

Global Connectedness Ranks and Scores

Rank	+/-	Country	Score
1	0	Singapore	78
2	0	Luxembourg	74
3	+1	Netherlands	73
4	-1	Ireland	72
5	0	Switzerland	69
6	0	Hong Kong SAR, China	69
7	+3	United Arab Emirates	68
8	-1	Belgium	67
9	-1	United Kingdom	66
10	+2	Denmark	66
11	0	Malta	66
12	+1	Sweden	65
13	-4	Cyprus	62
14	0	Germany	61
15	+1	Finland	61
16	+13	Malaysia	61
17	+1	Norway	61
18	-1	Czechia	60
19	0	Israel	60
20	-5	Hungary	59
21	0	Australia	59
22	-2	France	59
23	0	Austria	59
24	+1	Slovenia	59
25	+1	Estonia	59
26	-4	Canada	59
27	+7	Thailand	58
28	+5	Italy	58
29	-5	Iceland	58
30	+5	Portugal	58
31	+6	Korea, Republic of	58
32	+4	Taiwan, China	58
33	+11	Bahrain	58
34	-7	Spain	58
35	-4	Qatar	57
36	+3	Viet Nam	57
37	-9	New Zealand	57
38	-6	Lithuania	57
39	-9	United States	57
40	0	Seychelles	57
41	+1	Poland	56
42	+3	Lebanon	56
43	0	Greece	56
44	-6	Slovakia	55
45	-4	Bulgaria	55
46	+2	Japan	55
47	+2	Serbia	54
48	+6	Saudi Arabia	54
49	-3	Latvia	54
50	+1	Croatia	54
51	-4	Maldives	54
52	-2	Türkiye	53
53	0	South Africa	53
54	+1	North Macedonia	53
55	+8	Macau SAR, China	53
56	+13	Jordan	52
57	-1	Romania	52
58	0	India	52
59	-2	Philippines	52
60	+4	Brazil	52
61	-1	Ukraine	52

Rank	+/-	Country	Score
62	+11	Morocco	52
63	-1	Chile	52
64	+39	Guyana	52
65	-13	Mauritius	51
66	-1	Kuwait	51
67	+19	Oman	51
68	+60	Namibia	51
69	-3	Brunei Darussalam	51
70	-9	Georgia	50
71	-1	Armenia	50
72	-5	Montenegro	50
73	-5	Cambodia	50
74	+8	Tunisia	50
75	-1	Djibouti	50
76	+7	Antigua and Barbuda	50
77	+7	St. Kitts and Nevis	50
78	0	Mexico	50
79	+6	Fiji	49
80	-8	Panama	49
81	-4	China	49
82	+8	Bosnia and Herzegovina	49
83	-7	Sri Lanka	49
84	+16	Albania	49
85	-10	Mongolia	49
86	+24	Libya	49
87	+14	Suriname	49
88	+11	Andorra	49
89	-9	Moldova	49
90	+5	Trinidad and Tobago	49
91	0	Costa Rica	49
92	-3	Peru	49
93	-14	Jamaica	48
94	+3	Kazakhstan	48
95	+7	Egypt	48
96	-2	Gabon	48
97	-26	Ghana	48
98	-5	Argentina	48
99	-3	Colombia	47
100	+20	Nigeria	47
101	+10	Ecuador	47
102	-10	Barbados	47
103	+21	Congo	47
104	+21	St. Vincent and the Grenadines	47
105	-17	Azerbaijan	47
106	-1	Honduras	47
107	-26	Mozambique	47
108	+47	Kyrgyzstan	47
109	+47	Lao People's Democratic Republic	47
110	+3	Uruguay	47
111	-2	Belize	47
112	-5	Indonesia	47
113	-1	Nicaragua	46
114	+27	Zambia	46
115	+27	Cuba	46
116	0	Dominican Republic	46
117	-13	St. Lucia	46
118	-31	Dominica	46
119	+2	Kenya	46
120	-22	Liberia	46

Rank	+/-	Country	Score
121	-7	Tonga	46
122	+9	Senegal	46
123	+14	Côte d'Ivoire	46
124	+22	Gambia	46
125	+18	Kiribati	46
126	+10	El Salvador	45
127	-12	Pakistan	45
128	-69	Russian Federation	45
129	-7	Mauritania	45
130	0	Iraq	45
131	-13	Cabo Verde	45
132	+8	Nepal	45
133	-25	Ethiopia	45
134	-7	Bahamas	45
135	-3	Guinea	45
136	-17	Madagascar	45
137	-8	Bangladesh	45
138	-12	Solomon Islands	45
139	+31	Timor-Leste	45
140	+7	Angola	44
141	+4	Guatemala	44
142	-3	Cameroon	44
143	+7	Paraguay	44
144	-6	Bolivia, Plurinational State of	44
145	+4	Uganda	44
146	-11	Iran, Islamic Republic of	44
147	+26	Bhutan	44
148	-42	Belarus	44
149	+5	Tanzania, United Republic of	44
150	+2	Papua New Guinea	44
151	+8	Lesotho	44
152	+6	Rwanda	44
153	-30	Samoa	44
154	+13	Congo, Democratic Republic of the	44
155	-21	Algeria	44
156	-5	Uzbekistan	44
157	+6	Malawi	43
158	-10	Togo	43
159	-15	Chad	43
160	-43	Myanmar	43
161	-1	Sierra Leone	43
162	-29	Vanuatu	42
163	-10	Venezuela, Bolivarian Republic of	42
164	+1	Eswatini	42
165	+12	Tajikistan	42
166	-2	Guinea-Bissau	42
167	+1	Benin	41
168	+3	Mali	41
169	+7	Afghanistan	41
170	+9	Zimbabwe	41
171	-10	Burkina Faso	41
172	-10	Haiti	41
173	-4	Botswana	41
174	0	Burundi	41
175	-18	Central African Republic	40
176	-1	Syrian Arab Republic	40
177	-11	Sudan	40
178	0	Niger	40
179	-7	São Tomé and Príncipe	39
180	0	Yemen	38

East Asia & Pacific | Middle East & North Africa | South & Central America & Caribbean | Sub-Saharan Africa | Europe | North America | South & Central Asia

THE DEGLOBALIZATION MYTH

At least through 2025, the world has stayed as connected as ever. The resilience of international flows stands in sharp contrast to the widespread claim that globalization is going into reverse.

Several common errors and biases can make deglobalization appear stronger than it actually is:

- We often assume that developments in major economies like the U.S. and China—or in strategic industries such as semiconductors or critical minerals—represent global trends. They usually do not.
- The belief that the world was once close to unfettered globalization. Because this was never the case, new restrictions can look more dramatic than they are.
- Motivated reasoning also plays a role. Both supporters and critics of globalization sometimes exaggerate small shifts to support their agendas.
- Our natural bias to focus on negative developments—such as tariff hikes—means we pay less attention to positive ones, like new trade agreements.

In fact, despite all risks, there are several strong reasons why global flows may stay resilient moving forward:

- **Globalization gains still matter:** Most leaders aim to preserve gains from globalization while mitigating risks and vulnerabilities.
- **Adaptability drives resilience:** Companies have boosted their capacity to adjust rapidly to new cross-border frictions.
- **De-risking does not equal deglobalization:** Most business is between friendly countries, and shifts of production to alternative locations often boost trade and international investment.
- **Technology could still boost global flows:** Technology has historically expanded globalization by reducing the costs and challenges of distance. New technologies such as AI could again boost growth in global flows.
- **Multipolar growth expands opportunities:** While geopolitical rivalry creates risks, a broader spread of economic activity across countries also multiplies opportunities for international exchange.

Even in a turbulent world, it is far from certain that the future will be less globalized. So far, companies and countries are managing the challenges and opportunities of a complex and highly interconnected world—not pulling back behind national borders.

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THE DHL INITIATIVE ON GLOBALIZATION

The DHL Initiative on Globalization at NYU Stern's Center for the Future of Management aims to develop and maintain the academic world's most comprehensive collection of data on the globalization of trade, capital, information, and people flows, and to be a leading center of excellence for data-driven globalization research. Drawing upon this unique research base, the Initiative strives to provide business leaders, policymakers, and educators timely and useful insights into the state and trajectory of globalization, how globalization affects companies and countries, and best practices for connecting across borders. Find out more at: **stern.nyu.edu/globalization**

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- An additional collection of 180 one-page country profiles provides concise summaries of globalization patterns for each country.
- Maps, charts, and other data visualizations bring the facts to life, making the report not only a valuable resource for pinpointing promising business opportunities, but also a convenient reference for a broad range of audiences.
- Published regularly since 2011, the DHL Global Connectedness Report supports fact-based debate and helps separate globalization facts from fiction.

Download the complete report at dhl.com/gcr
This web page also contains additional resources, including an interactive tool that can be used to customize results.

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