



# DHL EXPORT BAROMETER 2019

Insights from Australian exporters on confidence in the global export market, political and economic developments, emerging industry trends, and sales and marketing strategies.

WITH  
ANALYSIS FROM  
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THE AIRPORT  
ECONOMIST.

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# ABOUT THE DHL EXPORT BAROMETER

**The DHL Export Barometer is a report which provides analysis on export confidence among Australian businesses.**

Since launching in November 2003, this annual indicator has generated independent and industry-specific research for Australian exporters by examining the issues directly impacting exporters, including new trends and fast-paced changes happening in overseas markets.

The 16th DHL Export Barometer was conducted by ACA Research, which surveyed 920 Australian exporters online between 21 August and 5 September this year. Respondents were selected from the DHL Express database and this year marked the

highest number of respondents since the Barometer was launched.

This group of exporters represented a broad cross-section of the country, with NSW/ ACT businesses making up 37% of those surveyed, VIC/ TAS businesses 29%, QLD 20%, WA 9% and SA/ NT 6%.

Businesses ranged in size from smaller operations with fewer than five employees, to large organisations with more than 100 staff. The data is weighted by services (20%) versus goods (80%).

**THIS YEAR, 920  
AUSTRALIAN EXPORTERS  
WERE SURVEYED  
BETWEEN 21 AUGUST  
AND 5 SEPTEMBER.**

# CONFIDENCE TAKES A DENT BUT EXPORTER PLANS PERSIST

AT 69%, EXPORTERS MAINTAIN A FIFTH CONSECUTIVE YEAR OF ABOVE AVERAGE LEVELS OF CONFIDENCE SINCE RECOVERY FROM THE GLOBAL FINANCIAL CRISIS (GFC), DESPITE A FALL FROM A RECORD 75% IN 2018.

**While uncertainty in the world trade system due to protectionism and tariffs has dented exporter confidence in the past year, Australian exporters remain solid in their export strategies – that’s the key message from the findings of the DHL Export Barometer 2019.**

This year, confidence is registering positive. At 69%, exporters maintain a fifth consecutive year of above average levels of confidence since recovery from the Global Financial Crisis (GFC). This comes despite a fall from a record 75% in 2018.



Export destinations are still spread evenly across the world, with the proportion of businesses exporting to each region remaining consistent, despite slight declines in Europe Middle East and Africa (EMEA) and North East Asia.

New Zealand, with its stability and ease of business for Australian exporters, is the only export destination that has seen continuous growth over the past three years.

Tariffs or threats of tariffs, meanwhile, have slightly choked off exporter confidence in the US. The exchange rate of the USD/AUD has also affected exporters who import inputs from the US market.

In terms of challenges, not surprisingly, tariffs remain a major issue worrying exporters. This could be in part attributed to the high-profile US-China ‘trade war’ that has dominated headlines in the past year. Among the businesses surveyed, 45% report the ongoing trade tensions will negatively impact the exporting environment, an increase of 24% on 2018.

Uncertainty surrounding Brexit has slowed UK numbers, where exports had previously experienced steady growth until the 2016 Brexit referendum. In parallel, a slight decline has registered in the proportion exporting to Europe Middle East and Africa (EMEA) and North East Asia.

However, in the longer term, results this year show the proportion of exporters targeting Western hemisphere economies increased, on the back of new exporters entering world markets. The share exporting to China, Indonesia and South Korea has declined since 2013.

In the face of global events, Australian exporters remain determined to move ahead with their export growth plans, increasingly adopting new sales and marketing strategies. More than two-thirds of exporters (77%) report generating orders via online channels and more than half (56%) are utilising social media as a means for reaching new customers abroad. This growth is also translating into benefits for the Australian economy, with half (50%) of Australian exporters planning to create new jobs in the coming year and 65% planning wage rises for existing employees.

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# EXPORTER CONFIDENCE REIGNS

THE 16TH DHL  
EXPORT BAROMETER  
2019 SHOWS 69% OF  
AUSTRALIAN TRADE  
BUSINESSES ARE  
OPTIMISTIC ABOUT THE  
COMING 12 MONTHS.

**Australia's export industry is shaping up for another strong year with confidence running high, despite an increasingly complex international landscape.**

The 16th DHL Export Barometer 2019 shows 69% of Australian trade businesses are optimistic about the coming 12 months.

The result marks the fifth consecutive year where confidence is tracking above the long-term average and follows a stellar result in 2018 when the industry hit a new peak, with 75% of exporters expecting a good year ahead.

This is encouraging, especially with exporters facing a rapidly changing e-commerce marketplace and

developing political situations in both the US and the UK that are reportedly impacting the way exporters do business.

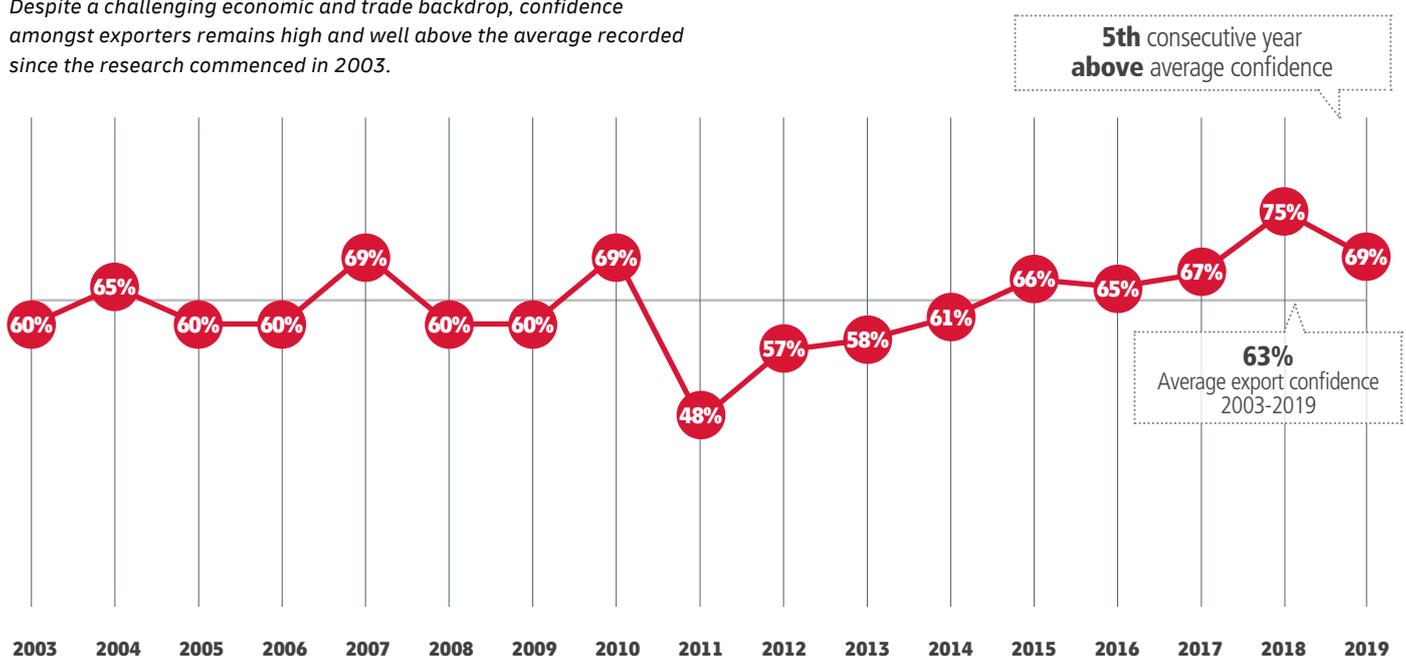
New Zealand and the US continue to be the dominant destinations for Australian exports.

In terms of headwinds, the US-China trade war is on the radar for many, with the number of businesses saying the ongoing conflict will have negative impacts sitting at 45% – more than double the number that flagged issues in 2018 (21%).

However, overall prospects are looking good with 56% of businesses reporting an increase in sales in the past 12 months and 69% forecasting rising sales in the coming year.

## DHL EXPORT BAROMETER

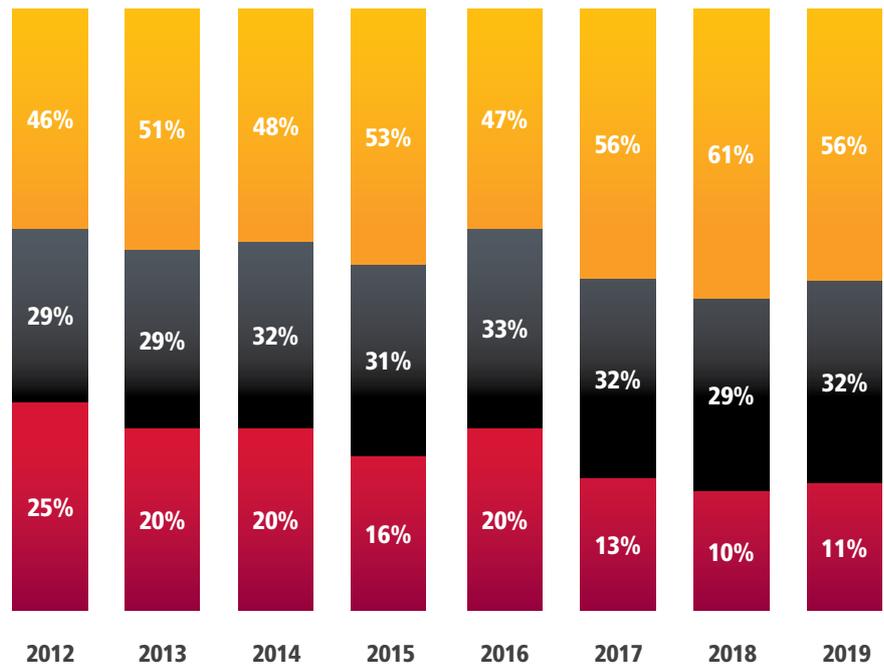
*Despite a challenging economic and trade backdrop, confidence amongst exporters remains high and well above the average recorded since the research commenced in 2003.*



## CHANGE IN ACTUAL EXPORT ORDERS OVER THE LAST 12 MONTHS

In line with confidence data, a decline to 56% of businesses reporting an increase in export orders over the past 12 months. While this is slightly weaker than 2018, it is in line with 2017, and well above the previous 5 years (2012-2016).

● INCREASE
 ● NO CHANGE
 ● DECREASE



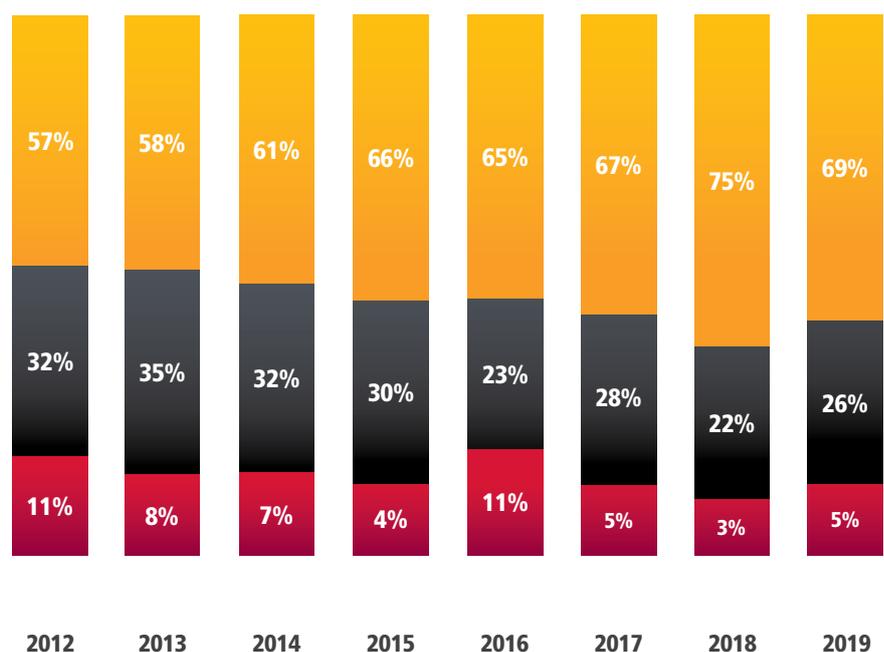
A highlight in this year's Barometer is the participation level from export businesses with 920 contributing to the 16th annual survey results – the highest level of response since the DHL Export Barometer's inception.

The upward tick is driven largely by the emergence of a range of small office/ home office (SOHO) and small businesses that are tapping into new e-commerce opportunities.

## CHANGE IN EXPECTED EXPORT ORDERS OVER THE NEXT 12 MONTHS

Despite lower export confidence, the proportion of businesses expecting their sales to decline remains negligible

● INCREASE
 ● NO CHANGE
 ● DECREASE



The result confirms that the pool of Australian exporters is growing, and companies are focused on industry engagement and the betterment of their business.

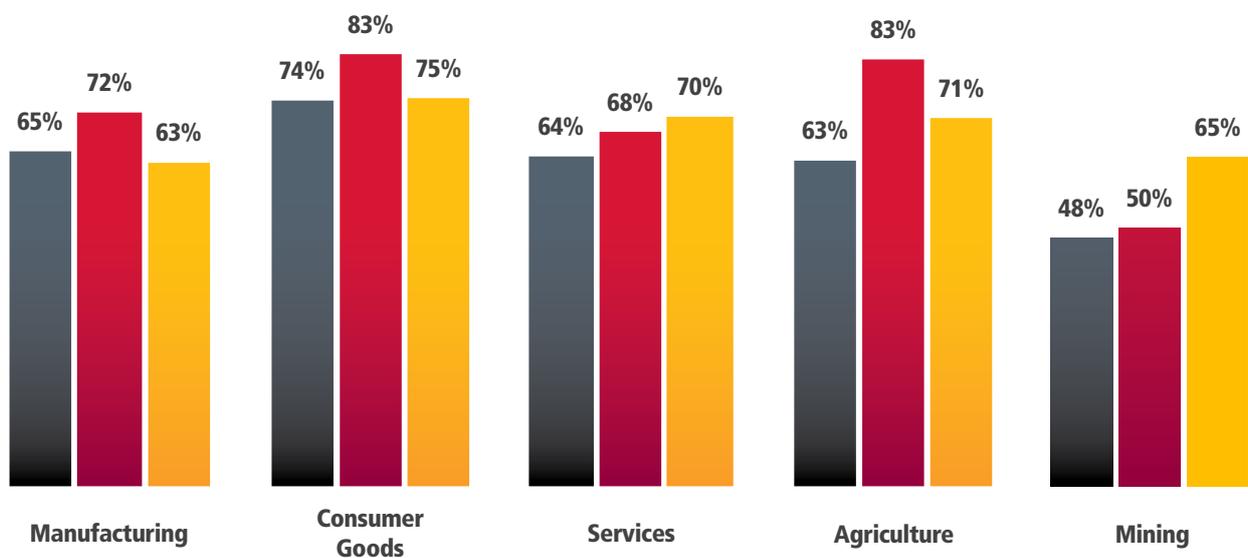
Looking at the different sectors in 2019, confidence is highest among consumer goods businesses (75%), while agriculture exporters are also tracking well (71%).

There is a resurgence in the mining sector with rising activity and investment, which has seen confidence lift from 50% in 2018 to 65%.

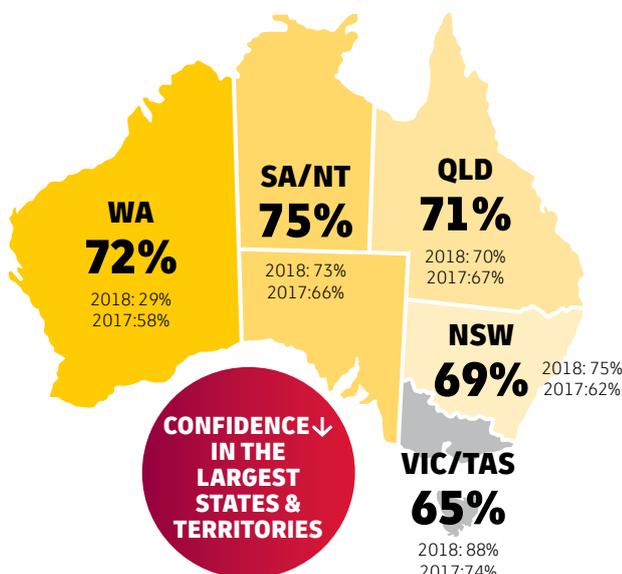
This puts confidence on par with 2012 and is tied to optimism remaining strong in QLD, SA and particularly WA (72%).

## CONFIDENCE BY SECTOR

Confidence in the Manufacturing sector is lagging other industry groups, while the Mining sector is more positive, aligning to the resurgence of activity and investment not seen since the industry last peaked in 2012.



## CONFIDENCE BY LOCATION OF BUSINESS



It is notable that exporters in NSW (69%) and VIC (65%) reported a decline in confidence looking forward. Similarly, optimism in the manufacturing industry is down with businesses recording the lowest confidence level at 63%.

Also consistent with previous years, larger, more experienced exporters are less optimistic about future orders, showing the global economy and geo-political issues are having impacts.

All in all, the DHL Export Barometer 2019 shows exporters are preparing for another good year with businesses continuing to grow and support the Australian economy by delivering new products, creating more jobs and boosting wages.



# E-COMMERCE CONTINUES TO DOMINATE

ONE AREA OF STRONG FOCUS IN THE PAST 12 MONTHS IS WEBSITE FUNCTIONALITY TO PROVIDE A BETTER OVERALL CUSTOMER EXPERIENCE.

## Online business is booming, with Australian exporters continuing to embrace e-commerce and 77% of those surveyed generating orders on the internet.

The figure is similar to 2018, but exporters are now pushing to raise the bar by actively improving their online systems and boosting the sophistication of their online marketing, especially among SOHO businesses.

One area of strong focus in the past 12 months is website functionality to provide a better overall customer experience.

This is being carried out by more than one third (36%) of exporters surveyed and 42% of small businesses.

For those using website building tools, WordPress is the market leader being used by 36% of businesses.

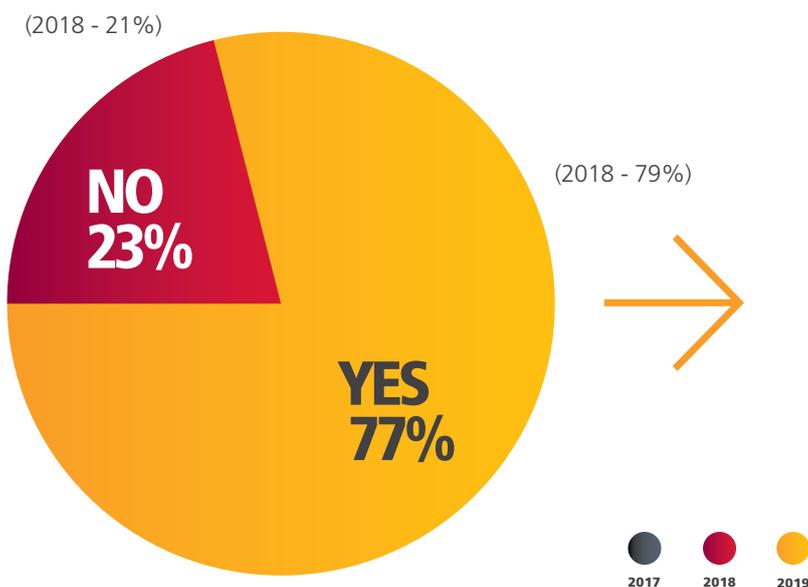
This is followed by Shopify (14%) and GoDaddy (9%).

Meanwhile, the cloud-based web development platform Wix is utilised by 6%.

When it comes to online store platforms, Shopify again leads the pack and is relied upon by 34% of the online sellers surveyed.

WooCommerce – a platform specifically designed for online merchants using WordPress – attracted 21% of online exporters.

## PROPORTION OF EXPORTERS WHO GENERATE ORDERS OR ENQUIRIES FROM ONLINE CHANNELS



While better website design is the top area of focus, competitive promotions have also significantly increased, with 20% of companies using this technique to drive sales, up from 14% last year.

The trend of traders improving all elements of their online ecosystems will no doubt generate favourable results for exporters in the long term and will be further boosted by the multitude of businesses also focusing on mobile optimisation and localised websites.

When it comes to the marketing budget, unsurprisingly most e-commerce businesses (85%) are using online channels to generate sales.

Of these, 25% are embracing digital wholeheartedly, spending more than half of their marketing funds online.

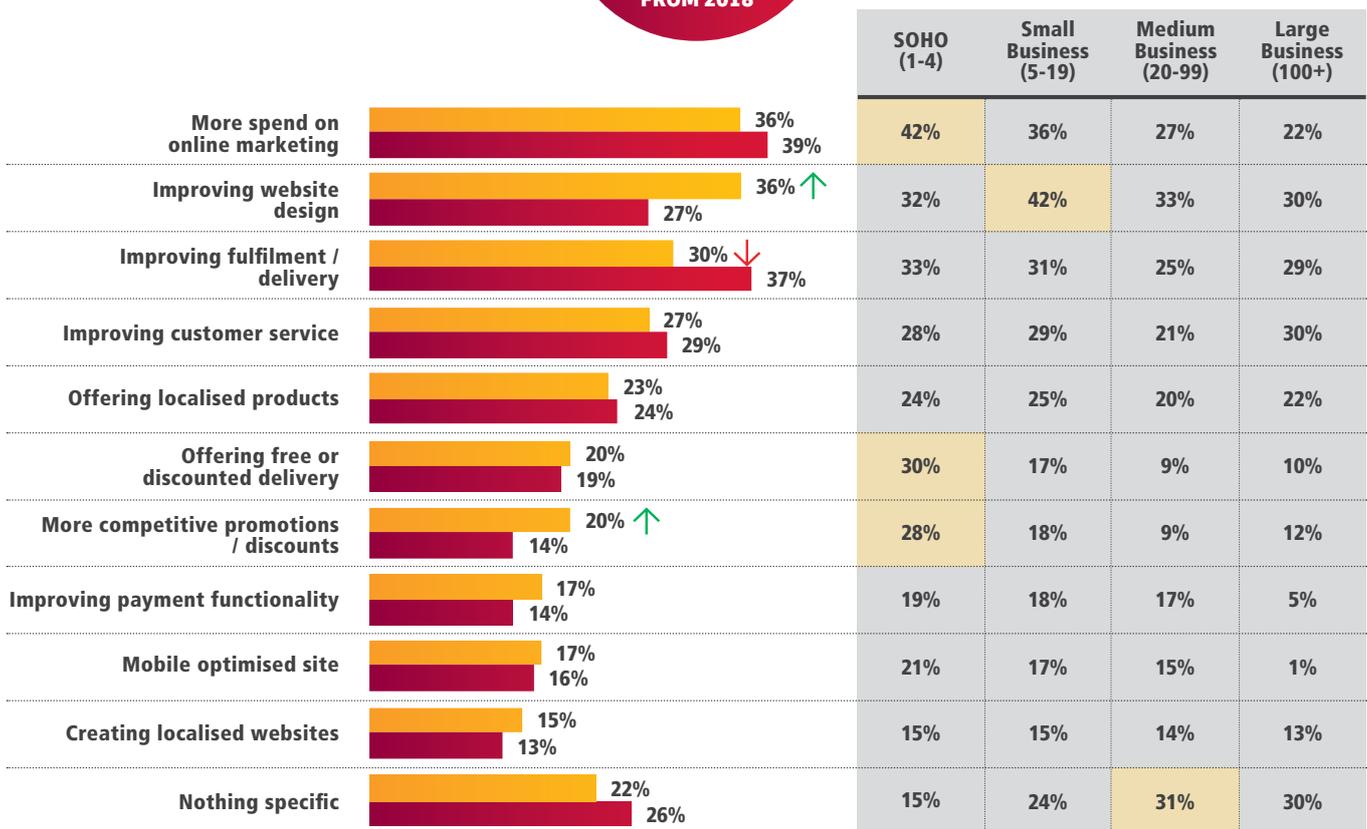
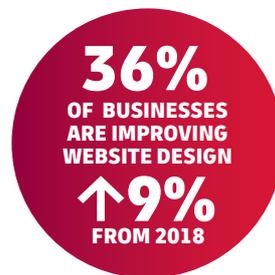
Furthermore, almost a third of exporters (31%) spend between 20% and 50% of their budget on the internet, up from 28% last year.

This clearly shows online presents strong advertising advantages for many businesses in the e-commerce marketplace. However, some exporters still find value in utilising traditional media, with 15% choosing to market solely offline.

## WHAT ARE YOU DOING TO DRIVE ONLINE EXPORT ORDERS?

Focus on better website design and promotions has increased significantly over the past year. SOHO businesses are particularly active improving many elements of their online ecosystem and marketing to deliver more export sales.

2018 2019





# FORWARD THINKING

ECO-OPTIONS ARE ESPECIALLY IMPORTANT TO EXPORTERS IN THE B2C MARKET WITH 28% INDICATING SUSTAINABLE PACKAGING AS DESIRABLE COMPARED TO 20% OF B2B COMPANIES.

## Delivery and transport can present a challenge for exporters, but encouragingly nine out of 10 (89%) say their logistics providers are meeting their needs this year.

But there is always opportunity for progress, and some exporters are on the hunt for smarter, faster, and more sustainable delivery options to keep their customers happy.

Among the companies surveyed, almost half (45%) believe their customer base would like to see more economy non-urgent delivery options.

Goods being delivered within a defined time window is another popular concept, with almost a third (30%) of exporters putting it on their service innovation wish list.

A quarter (26%) flagged delivery outside of business hours as an option, and returns solutions as a key area

for evolution, with 21% overall saying customers want improvements in this regard. This is even higher for B2C companies (28%).

Going green is another trend at the top of the agenda, with environmentally friendly packaging ranking fourth highest (23%) when it comes to what Australian exporters want.

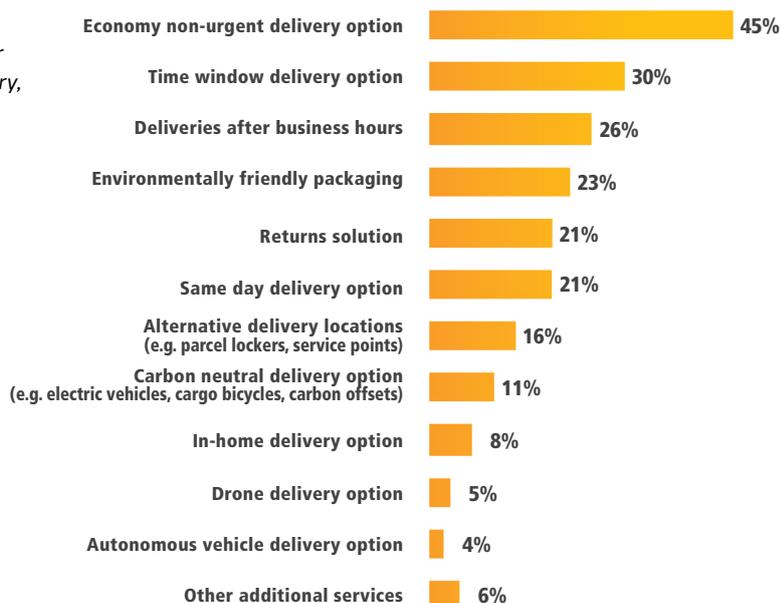
Eco-options are especially important to exporters in the B2C market with 28% indicating sustainable packaging as desirable compared to 20% of B2B companies.

This is on top of support for carbon neutral initiatives including electric vehicles, cargo bicycles and carbon offsets, which appeal to one in 10 (11%) businesses.

Moving forward, the industry is also likely to see more discussion around futuristic alternatives, with 5% flagging interest in drone delivery.

## SERVICE OFFERINGS & INNOVATIVE SOLUTIONS BUSINESSES WOULD LIKE TO SEE OFFERED

Exporters dealing directly with consumers have greater needs associated with delivery, returns and environmentally friendly packaging.



	B2B	B2C
Economy non-urgent delivery option	45%	44%
Time window delivery option	31%	30%
Deliveries after business hours	24%	30%
Environmentally friendly packaging	20%	28%
Returns solution	18%	28%
Same day delivery option	21%	21%
Alternative delivery locations (e.g. parcel lockers, service points)	13%	22%
Carbon neutral delivery option (e.g. electric vehicles, cargo bicycles, carbon offsets)	10%	12%
In-home delivery option	7%	12%
Drone delivery option	4%	6%
Autonomous vehicle delivery option	4%	4%
Other additional services	5%	6%



# SOCIAL MEDIA IS KING

## BUT SEM IS RISING

ONE EMERGING TREND IS THE USE OF SEARCH ENGINE MARKETING (SEM), WITH THE PROPORTION OF EXPORTERS USING GOOGLE ADS JUMPING FROM 31% TO 37% IN THE PAST 12 MONTHS.

**When it comes to online marketing, social media remains the firm favourite with Facebook and photo-sharing platform Instagram leading the way.**

More than half of Aussie traders (56%) are using social media platforms to attract customer orders, above the 48% in 2017.

Facebook attracts the most business, being utilised by 43% of exporters overall, but use is higher among B2C marketers (59%).

Instagram is the second most popular (31%), followed by LinkedIn (19%) and YouTube (11%).

### ONLINE CHANNELS USED TO ATTRACT EXPORT ORDERS

Social media continues to be the most important online sales channel, with Facebook and Instagram leading the way, even amongst B2B businesses. Use of online advertising continues to increase, driven by Google Ads/ SEM.

**56%**  
USE SOCIAL MEDIA CHANNELS

**40%**  
USE ONLINE ADVERTISING

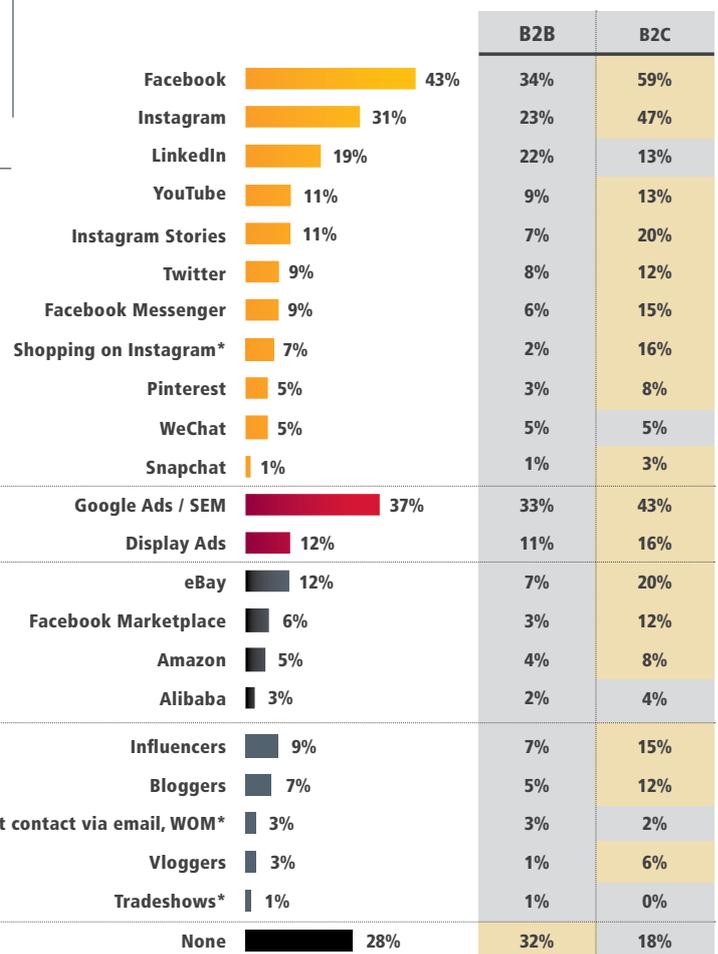
**20%**  
USE ONLINE MARKET PLACES

**16%**  
USE OTHER CHANNELS

While Twitter use sits at 9%, WeChat and Pinterest each capture 5% of the market.

One emerging trend is the use of search engine marketing (SEM), which is a potential game-changer with the proportion of exporters using Google Ads jumping from 31% to 37% in the past 12 months.

Meanwhile, influencers, bloggers, vloggers and other online marketing techniques are being used by 16% of businesses, which is on par with previous years.



\*Options added in the 2019 survey.



# EXPORTERS LOOK TO THE WEST

68 % OF AUSTRALIAN  
BUSINESSES EXPORT  
TO NEW ZEALAND,  
THE ONLY EXPORT  
DESTINATION THAT HAS  
SEEN CONTINUOUS  
GROWTH IN TRADE.

**Our Kiwi neighbours were once the clear top trading partner, but in 2019 both New Zealand and North America dominate when it comes to Australian exporters' favoured destinations.**

The favoured destination since 2013, New Zealand is the only export destination that has seen a continuous increase in trade, rising 17% to be used by 68% of Australian businesses.

During the same period, North America has experienced ups and downs, but rose by 10% overall.

Looking to wider trends, the Barometer clearly shows the proportion of exporters targeting Western economies is on the rise, whereas trade with Eastern countries such as China, Indonesia and South Korea has been declining since 2013.

The UK remains one obvious outlier where exports have stalled since the Brexit vote in 2016, with the number of businesses targeting the UK region hovering at 35%.

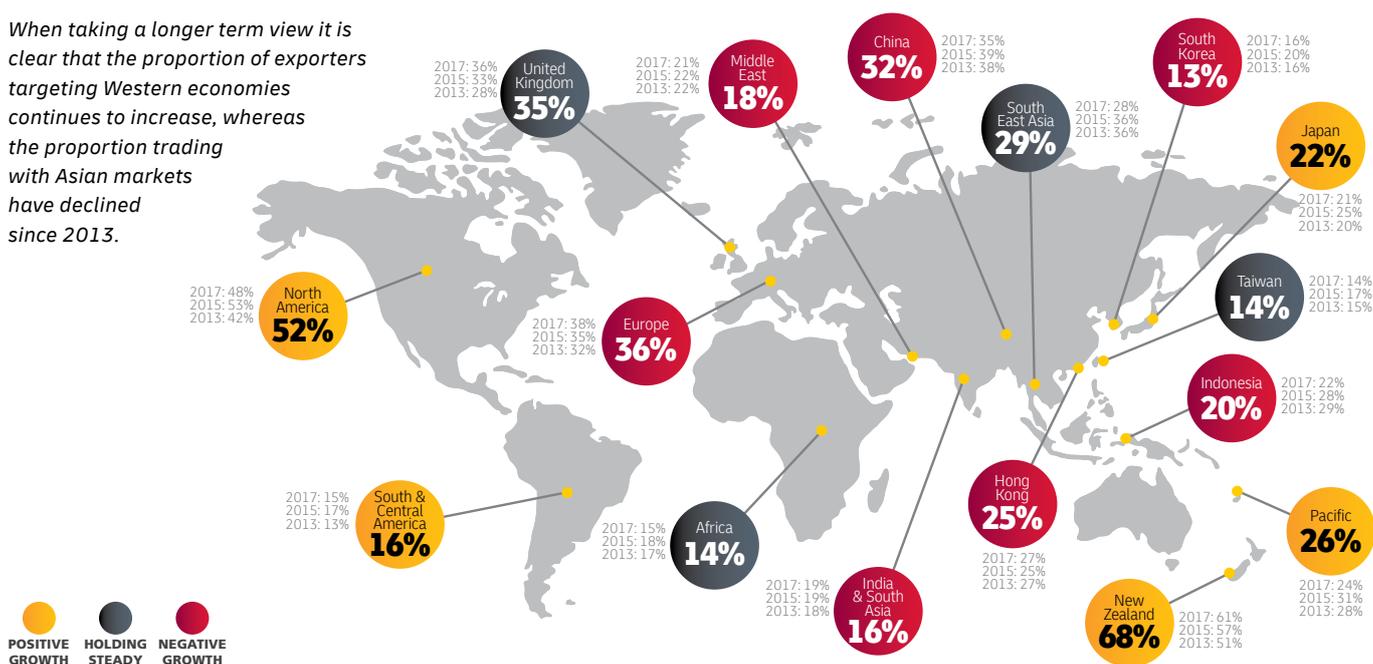
Although the US is presenting plenty of opportunities for an array of exporters, the region does not come without complications.

Aussie traders are openly flagging concerns about the ongoing US-China trade war and associated tariff issues, which exporters are tipping to have impact on business moving forward.

The results also show apprehension about exchange rates with the US, indicating many exporters are likely importing from North America and therefore experiencing higher costs.

## CURRENT EXPORT DESTINATIONS

When taking a longer term view it is clear that the proportion of exporters targeting Western economies continues to increase, whereas the proportion trading with Asian markets have declined since 2013.

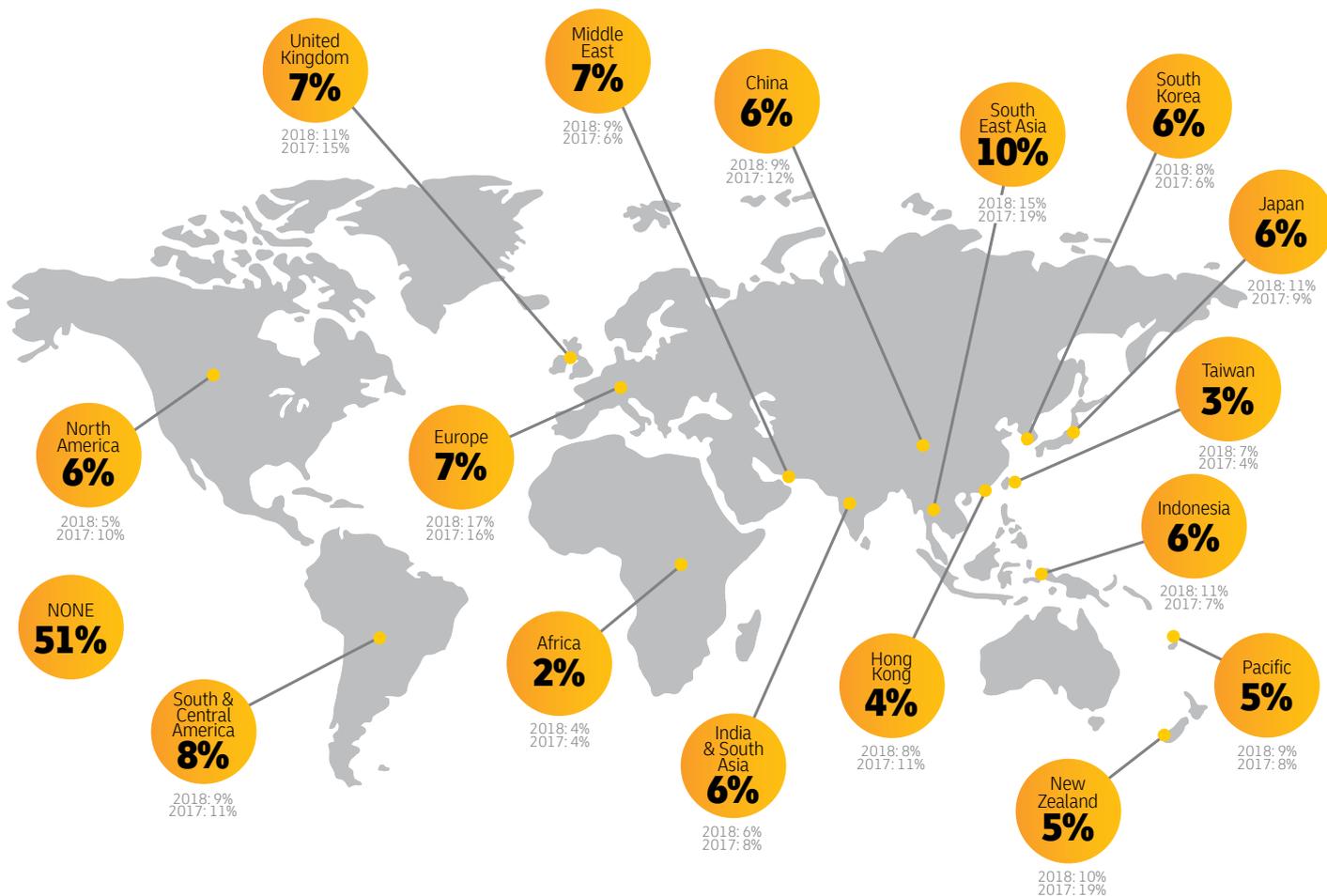


## DESTINATIONS PLANNING TO TARGET IN THE NEXT 12 MONTHS

Exporters appear to be becoming more selective when choosing export destinations. While 50% are looking at new markets in the year ahead, these exporters only plan to target 2 new destinations which is down from 3 in previous years.

**66%**  
OF NEWER  
BUSINESSES  
(TENURE < 5 YEARS)  
ARE MORE LIKELY  
TO TARGET NEW  
DESTINATIONS

**2**  
AVERAGE NUMBER  
OF NEW REGIONS  
AUSTRALIAN  
EXPORTERS ARE  
PLANNING TO  
TARGET





# POLITICAL AND ECONOMIC HEADWINDS

IN 2018, 21% OF AUSSIE EXPORTERS SAID THE TIT-FOR-TAT DISPUTE WOULD CREATE A CHALLENGING ENVIRONMENT, AND THIS FIGURE HAS NOW MORE THAN DOUBLED TO 45%.

**When it comes to the global political landscape, the trade war between the US and China is the biggest issue facing exporters.**

In 2018, 21% of Aussie exporters said the tit-for-tat dispute would create a challenging environment, and this figure has now more than doubled to 45%.

Australian exporters are also aware of China's Belt and Road initiative and seem increasingly concerned, with the number of exporters showing positivity about the project dropping by 10% in 2019.

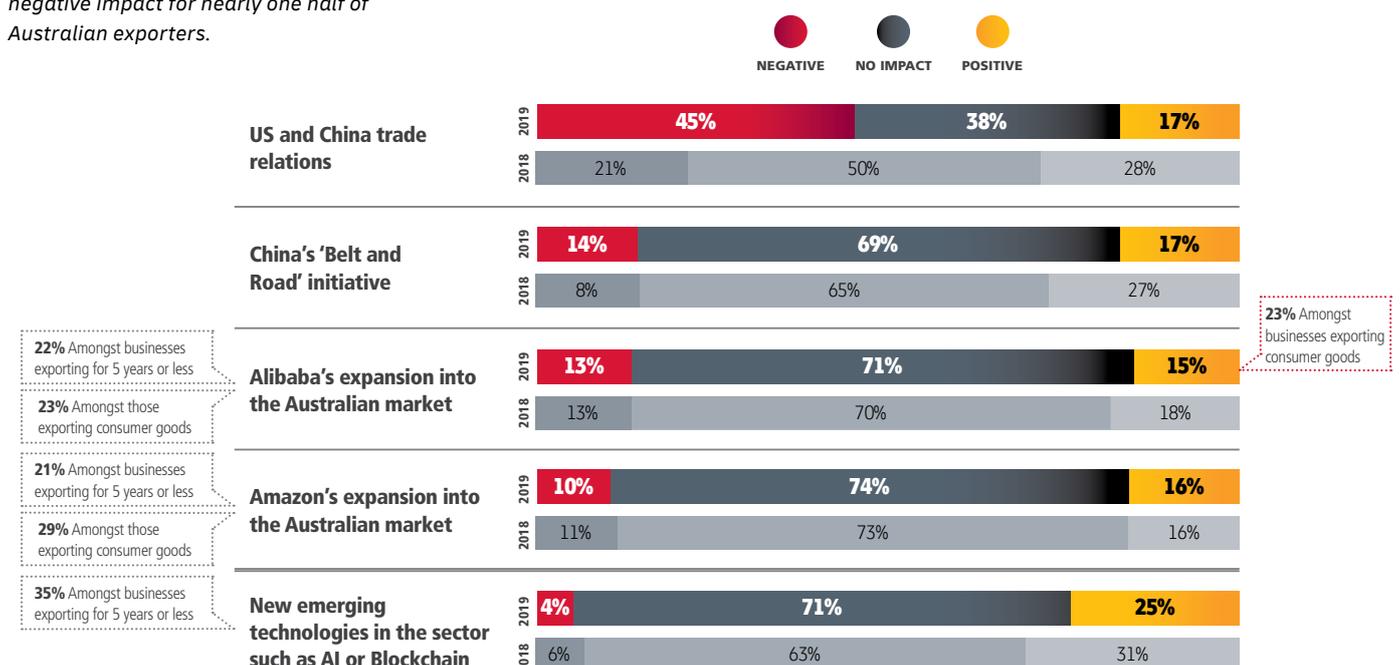
In the economic realm there is apprehension about the launch of online retail giant Amazon in Australia along with China's biggest e-commerce company Alibaba, which officially set up in Australia in 2017.

But levels of exporter concern remain encouragingly stable with only one in 10 businesses reporting unwelcome impacts from the overseas e-commerce giants, similar to 2018.

Again this year, the consumer goods category is more sensitive in this area with a higher number of companies reporting potential negative impacts (23%) than other sectors.

## IMPACT OF POLITICAL AND ECONOMIC ENVIRONMENT

Supporting previous data the US and China trade negotiations are having a negative impact for nearly one half of Australian exporters.





# FASHION A SHINING STAR

IN GENERAL, FASHION EXPORTERS HAVE SOME OF THE STRONGEST ONLINE SALES RECORDS, WITH 73% OF BUSINESSES GENERATING SALES THROUGH THE INTERNET.

**All eyes are on fashion exporters this year with 78% predicting an uptick in orders in the coming 12 months, showing a more confident long-term outlook than other sectors.**

In general, fashion exporters have some of the strongest online sales records, with 73% of businesses generating sales through the internet.

This is also tied to much higher online marketing budgets, with more than a third (36%) pouring at least 60% of funds into pushing products through digital mediums.

Top social platforms include Facebook, Instagram and Google Ads.

However, while fashion remains the darling of the e-commerce world in terms of numbers, exporters in other consumer goods categories are growing in strength.

Businesses selling toys and games, automotive products, homewares and gardening items all appear in higher proportions in the Barometer this year.

## FOCUS ON FASHION

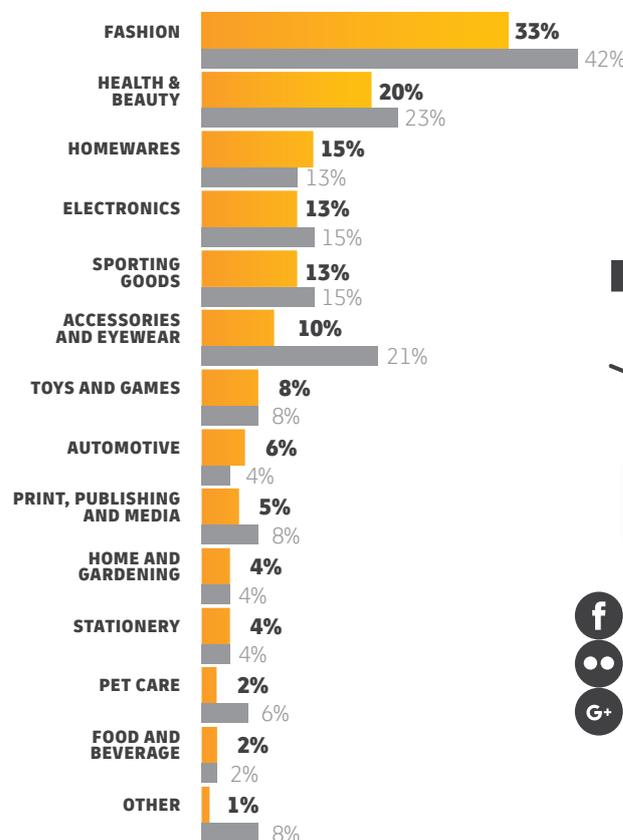
*Fashion exporters continue to be more confident than the average export business with 78% predicting an increase in orders over the next 12 months, driven by online sales generated through marketing on Facebook, Instagram and Google.*



2019



2018



**FASHION EXPORTERS SKEW ON:**



**78% expect increase** in orders



**On average, 73%** of their sales are **generated online**



**Higher online marketing spend**, with 36% spending over 60% of budget



- 67% use Facebook
- 67% use Instagram
- 43% use Instagram Stories
- 43% use Google Ads / SEM



# EXPORT CHALLENGES CONTINUE

DATA SHOWS EXPORTERS ARE BECOMING MORE SELECTIVE WHEN IT COMES TO EXPORT DESTINATIONS.

**Offshore markets, while lucrative, unfortunately pose some challenges for Australian exporters, particularly for new exporters, SOHOs and small businesses.**

In a new trend this year, the data shows exporters are becoming more selective when it comes to export destinations, with the average number of countries targeted by individual operators dropping from three to two.

The most common challenge listed is tariffs, with 30% of businesses saying they are an issue in the Americas,

25% in North East Asia, 26% in South East Asia and 28% in Europe and the Middle East.

Exchange rates also present problems despite the weaker Australian dollar, with 30% of exporters feeling the impact when trading with the Americas, and 27% indicating concerns in North East Asia, Europe and the Middle East.

On a positive note there is a significant rise in businesses that report no challenges in North East Asia (23%) and the Europe, Middle East and Africa region (21%).

## BIGGEST CHALLENGES WHEN EXPORTING: TOP 4 BY REGION

As might be expected, Australian exporters trading in the Americas, are feeling the impact of the ongoing tariff issues. Interestingly, a higher proportion of these exporters are also challenged by exchange rates despite the weaker Australian dollar.

AMERICAS	NORTH EAST ASIA	SOUTH EAST/SOUTH ASIA & PACIFIC	EUROPE, MIDDLE EAST & AFRICA
 <b>30%</b> (21%) Tariffs	 <b>27%</b> (28%) Exchange rates	 <b>26%</b> (25%) Tariffs	 <b>28%</b> (37%) Tariffs
 <b>30%</b> (23%) Exchange rates	 <b>25%</b> (23%) Tariffs	 <b>25%</b> (22%) Exchange rates	 <b>27%</b> (27%) Exchange rates
 <b>22%</b> (23%) Transport & logistics	 <b>21%</b> (13%) Strength of competition	 <b>23%</b> (29%) Transport & logistics	 <b>22%</b> (27%) Transport & logistics
 <b>21%</b> (19%) Legal / regulatory environment	 <b>19%</b> (23%) Transport & logistics	 <b>20%</b> (18%) Legal / regulatory environment	 <b>22%</b> (26%) Legal / regulatory environment
<b>20%</b> (19%) No challenges	<b>23%</b> (19%) No challenges	<b>24%</b> (31%) No challenges	<b>21%</b> (12%) No challenges
	<b>Significant rise</b> from 2018 where <b>9%</b> indicated <b>facing no challenges</b>		<b>Significant rise</b> from 2018 where <b>12%</b> indicated <b>facing no challenges</b>



# FINANCE TROUBLES

OF THOSE THAT ENCOUNTERED ROADBLOCKS, MORE THAN HALF (55%) SAY BANKS DID NOT UNDERSTAND THEIR BUSINESS, COMPARED TO 36% IN 2018.

**In 2019, more exporters want finance to set up and grow their businesses than in previous years with 45% applying for trade finance in the past 12 months. This is up from 40% in 2018.**

However, a small number of exporters (6%) experienced difficulties when approaching lenders, compared to 39% that did not experience any problems.

Of those that encountered roadblocks, more than half (55%) say banks did not understand their business, compared to 36% in 2018.

Trade businesses report the banks' lack of understanding of the exporters' business models as an ongoing issue.

The cost of finance being too expensive is another point of contention, which is a problem for 40% of businesses.

Additionally, financial lenders' guarantee criteria is proving to be a hurdle for the exporters that struggle to obtain trade finance, with 38% saying a lack of security is making borrowing difficult.

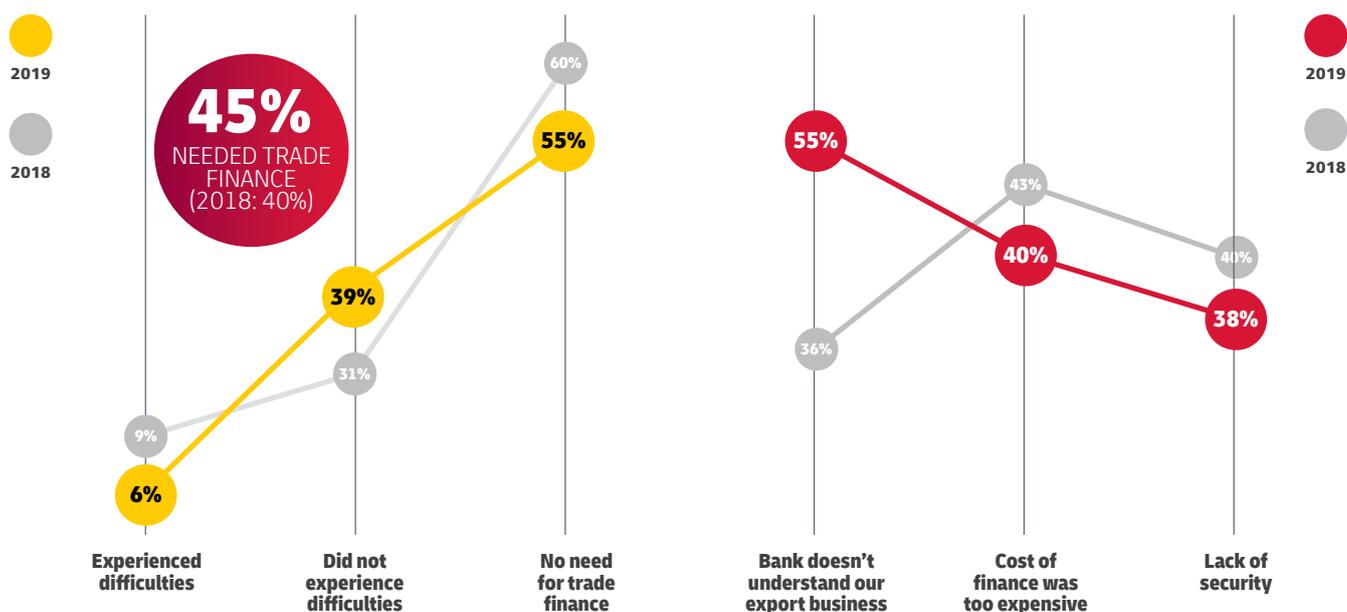
The problems are mostly encountered by small businesses, especially exporters operating for fewer than five years.

## EXPERIENCED DIFFICULTIES IN OBTAINING TRADE FINANCE

While fewer exporters are reporting difficulties in obtaining trade finance, there is an increasing perception that a lack of understanding of exporting businesses is limiting financing opportunities.

### REASONS FOR EXPERIENCING DIFFICULTIES

(Amongst those who experienced difficulties)





# AUSSIE EXPORTERS

## PAY IT FORWARD

A STELLAR 69% OF BUSINESSES IN 2019 ARE PREDICTING ORDERS TO INCREASE IN THE NEXT 12 MONTHS. THIS IS ON TOP OF 56% OF BUSINESSES WHICH REPORTED AN ACTUAL INCREASE IN THE PAST YEAR.

**Australian exporters are thriving in the global marketplace with increasing demand driven by product and service innovation as well as savvy marketing. The resulting prosperity is being enjoyed on home soil.**

A stellar 69% of businesses in 2019 are predicting orders to increase in the next 12 months.

This is on top of 56% of businesses which reported an actual increase in the past year.

While this is slightly weaker than last year's results, it is still a strong performance compared to the five-

year average, and businesses are using their profits to benefit the local economy.

Half (50%) of operators say they are planning to increase their workforce this year.

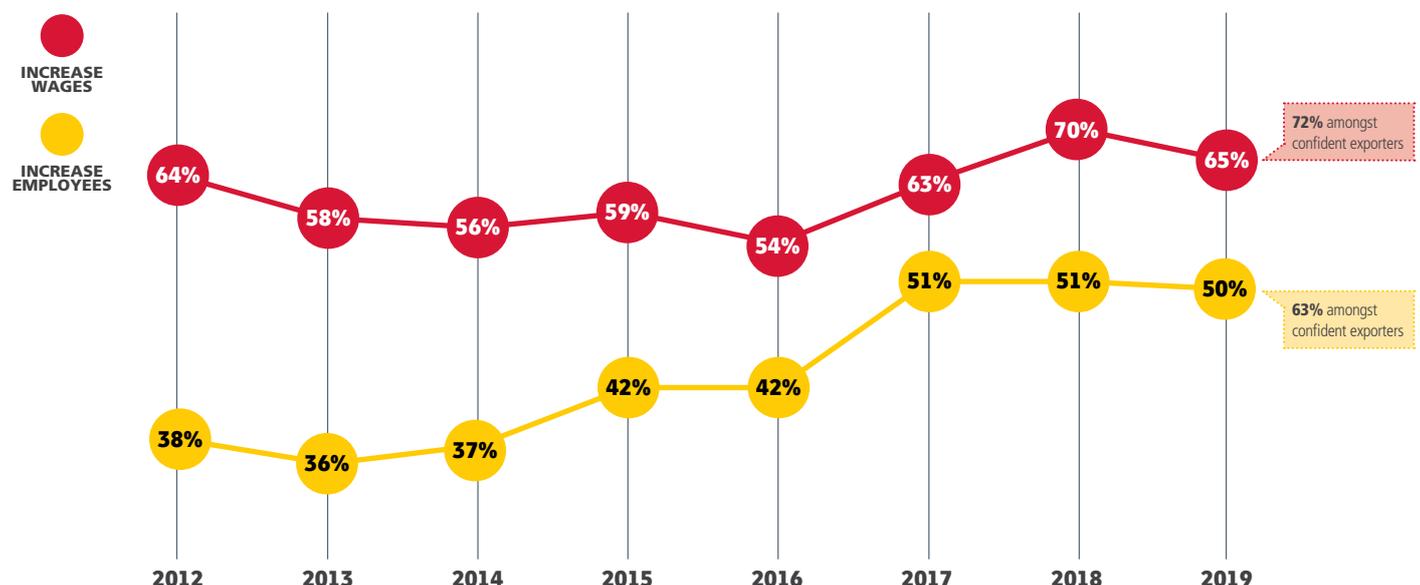
This is accompanied by a projected lift in wages for staff working for 65% of Australian exporters.

This indicator is proof the industry is in a strong position long term, especially as it comes at a time of continuing low wage growth in Australia<sup>1</sup>.

1 G Gilfillan, The extent and causes of the wage growth slowdown in Australia, Parliament of Australia, 9 April 2019, [https://www.aph.gov.au/About\\_Parliament/Parliamentary\\_Departments/Parliamentary\\_Library/pubs/rp/rp1819/WageSlowdown#\\_Toc5694019](https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/rp1819/WageSlowdown#_Toc5694019)

## NUMBER OF EMPLOYEES & WAGES

As reported in previous years, exporters continue to support the Australian economy by delivering new jobs and increased wages.





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