



DHL GLOBAL TRADE BAROMETER – WORLD

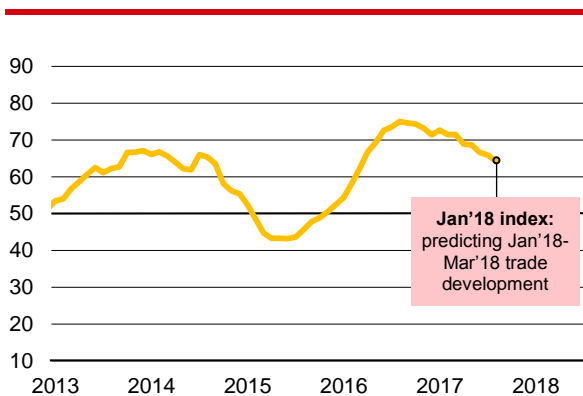
January 2018

DHL Global Trade Barometer scores 64 at the beginning of 2018, pointing to a moderate increase in world trade within three months

Key findings:

- Newly created index slightly below calculations for previous months (December: 66)
- Weakening prospects for Chinese and Japanese trade, partially offset by improved prospects for India, South Korea and Great Britain
- Trade in both, basic and industrial raw materials, highly dynamic; machinery parts & components growing equally strong. Lowest projected growth for consumer and fashion goods.

DHL Global Trade Barometer – World
Index 2013 – present, 50 = no change



DHL Global Trade Barometer – World
Indexes – latest three months

	Nov'17	Dec'17	Jan'18
Global Trade	67	66	64
Air Trade	74	73	71
Ocean Trade	61	61	60

The general outlook for global trade dynamics, measured by the DHL Global Trade Barometer, remains positive. Compared to the previous month, the general index value is down by -2 points. With a current value of now 64 points, the GTB thus predicts a mild slowdown in worldwide trade growth. This development has been foremost driven by East Asia: Both, the Chinese and the Japanese Trade

Barometers, show a declining outlook of -4 and -2 points, respectively. These effects have been partially upset by the positive outlooks for India (+2), South Korea (+2) and UK (+2). US trade is predicted to remain on its previous level, while the outlook for Germany is only slightly pointing downwards (-1).

The global outlook for air trade has dropped by -2 points, but continues to predict positive growth with a value of 71. The drop is mainly due to a decline in US and German air trade with -4 and -3 points, respectively. With respect to worldwide trade in containerized ocean freight, a similar picture emerges. Compared to December, the index value is slightly down with -1 points. The main reason for this is a rather steep decline in Chinese ocean trade, with -7 points since November of last year; indicators for all other countries point upwards.

DHL Global Trade Barometer – World Sector developments

Taking on a sectoral view, trade in raw materials proves to be the current growth driver in overall global trade dynamics. Worldwide trade in basic raw materials is expected to grow strongest amongst all sectors evaluated. This is mainly driven by Indian and British imports, as well as both imports and exports by the US.

A strong growth projection for machinery parts & components ranks second, which is mainly driven by strong Chinese exports and imports, as well as high volumes of German imports. This is closely followed by trade in industrial raw materials. British, Japanese and Indian imports were the main drivers behind those developments.

Machinery parts & components emerged as the fastest growing sector for air trade, followed by high technology. The highest growth in ocean trade can be expected from trade in basic raw materials, followed – with some distance – by industrial raw materials.



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About the DHL Global Trade Barometer:

The DHL Global Trade Barometer is an early indicator for the current state and future development of global trade. It is based on import and export data for a number of intermediates and early-cycle commodities that serve as the basis for further industrial production. Sources for the index are aggregated market data from air and containerized ocean freight from seven countries (China, South Korea, Germany, India, Japan, UK, USA), which account for more than 75 percent of world trade. These data are evaluated using artificial intelligence and various statistical methods and compressed to a single index value that represents the weighted average of the current growth and the upcoming two months of trade. The index, which was designed in cooperation with Accenture, is published four times a year by DHL on a global scale as well as for each of the seven countries surveyed.

About DHL:

Being the world's leading logistics provider, DHL is ideally equipped to derive a global trade outlook from logistics data. DHL has both, a deep understanding of the driving forces behind global trade volumes and the industry expertise to analyze and interpret occurring market data. With its family of divisions, DHL offers an unrivalled portfolio of logistics services ranging from national and international parcel delivery, e-commerce shipping and fulfillment solutions, international express, road, air and ocean transport to industrial supply chain management. DHL employs about 350,000 people in more than 220 countries and territories worldwide, reliably enabling global trade flows. With specialized solutions for growth markets and industries including technology, life sciences and healthcare, energy, automotive and retail, a proven commitment to corporate responsibility and an unrivalled presence in developing markets, DHL is decisively positioned as "The logistics company for the world".

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