

## WHITE PAPER

# The Trade Trends Report

*2017 Survey on Sourcing, Trade and e-Commerce*



## Introduction by Marianne Rowden, President, AAEI



Late in December 2016 and January 2017, AAEI and Amber Road conducted an online survey of global trade professionals: manufacturers, shippers, logistics providers, and other related service providers. The intent of the study was to create a report that provides a snapshot of e-commerce today and analyze the impact that the colossal growth of online sales, especially cross-border online sales, has on retailers, manufacturers, shippers and others.

The survey results were published in a January 2017 report, but some results were more puzzling, requiring further research. Responses to many questions needed further exploration; supply chain challenges were exposed, revealing trade trends that go beyond “just e-commerce” issues.

Building on the AAEI e-Commerce Benchmark report, this new and expanded report delves deeper into all of the key trends in the industry. AAEI and Amber Road are delivering an annual Trade Trends Report as a benchmark study for all global trade professionals. We hope you find the data and results valuable as you and your organizations continue to keep commerce moving.

Marianne Rowden

A handwritten signature in black ink that reads "Marianne Rowden". The script is fluid and cursive.

President & CEO  
American Association of Exporters and Importers

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## Executive Summary

So far, 2017 has been a year of great disruption for global trade professionals. Trade agreements are being canceled and renegotiated, regulatory enforcement is on the rise, the timeline for Brexit is approaching, political instability is a growing concern, and catastrophic weather-related events have disrupted supply chains worldwide. Networks that had been relatively stable for years are now in flux. Now more than ever, companies need to re-engineer processes and supporting systems to achieve a totally new level of agility to respond to these market forces.

Identifying the primary challenges and means to proactively prepare for these is what we present in this document.

- e-Commerce continues to blow the doors off traditional retail – literally in some situations – but comes with some risk.
- Traditional global commerce (e.g., container freight) is growing, but ever so slowly.
- Free trade and trade preference doesn't weigh heavily on all supply chains – except NAFTA.
- Product compliance and quality are important factors to sourcing execs – export and import compliance means the most to trade execs.

But it is equally important to realize how these considerations and the disruptions facing global supply chain can be mitigated; first through identifying and understanding them, then by transforming your supply chain into a digital, full-spectrum global trade management solution.





A conceptual image featuring a transparent wireframe globe with a green and blue Earth map inside. The globe is positioned on a black computer keyboard, with several keys like '=' and 'X' visible. The background is a blurred office setting. An orange semi-transparent rectangle is overlaid on the upper left, containing white text.

Now more than ever, companies need to re-engineer processes and supporting systems.



## Section 1: The e-Commerce Shift

The place of e-commerce in shaping today's retail landscape is no longer in dispute, if it ever was. The tidal wave of store closings that swept through the retail industry in 2016 took down both old icons and newcomers alike. While part of this was attributable to the global economic climate, a large portion of the impact came from e-commerce replacing traditional sales channels. Yet the wave of store closures that began in 2016 hasn't crested just yet.

As of the end of August 2017, year-to-date store closure announcements increased 182% year-over-year, with a total of 6,098 announced store closures in the US. Compare that to 2016, which saw 2,159 major store closures<sup>1</sup>.

<sup>1</sup> Fung Global Retail & Tech, *Weekly Store Openings and Closures Tracker #25*, September 2017



## Year-to-Date 2017 Major US Store Closure Announcements



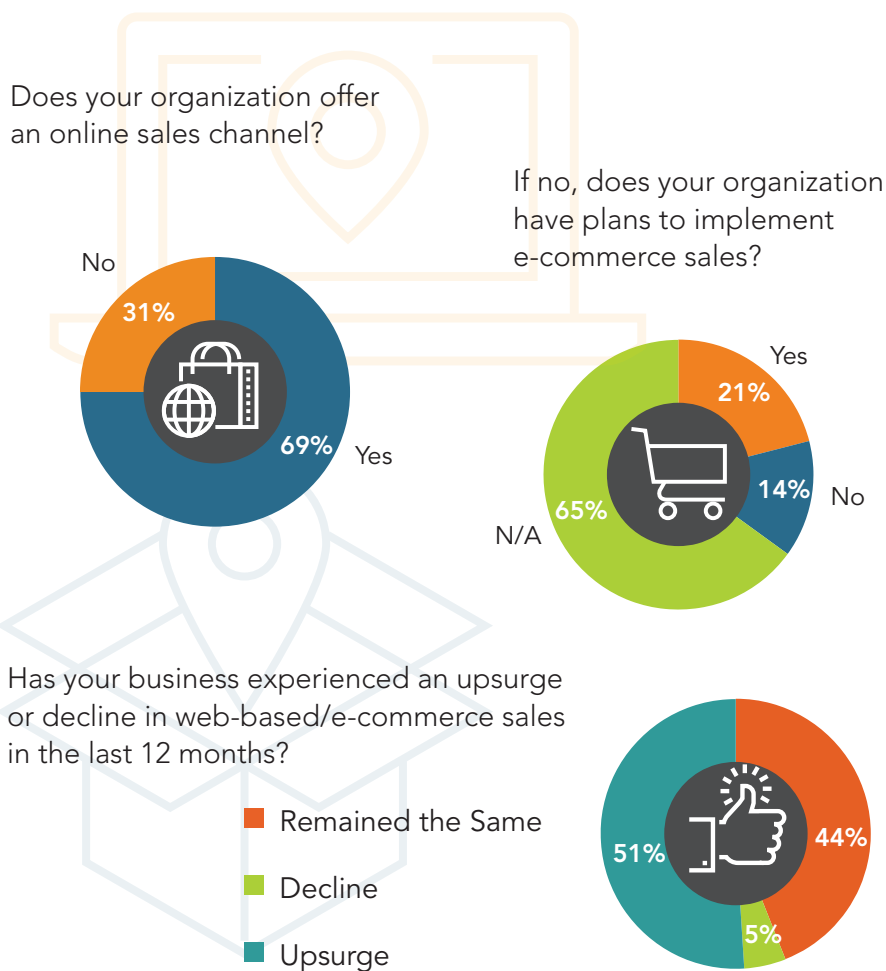
Source: Company reports/FGRT

In the UK, the number of store closures is slightly lower year-to-date than 2016. The 584 announced store closures are just 43 percent of the 2016 total of 1,021 store closures.

On the flip side, the notice of these closures comes alongside an increase in consumer spending. With traditional retail going down, that can only mean online shopping is going up. In response, companies are shifting their sights to e-commerce sales and fulfillment channels.

In our AAEI Annual Benchmark Report on e-Commerce released earlier this year, we found that the majority of companies currently have an online sales channel in place, and those without one had plans to do so in the future.

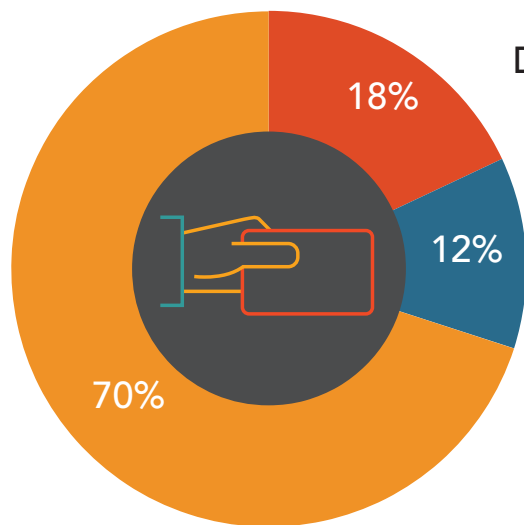
This statistic holds up in the latter half of 2017, with 69% of our survey respondents currently utilizing online sales channels, and more than half of those without one planning to implement one in the near future. (See figure below.)



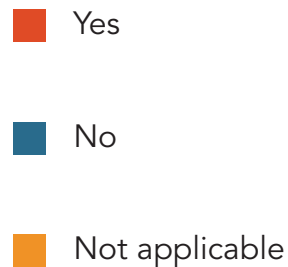
This study was derived from an online survey of 250 executives at leading U.S. companies during July and August 2017. The study incorporates a balanced mix of respondents representing the various types of importers and exporters today.

- Approximately 60 percent of respondents are self-identified manufacturers, 25 percent self-identified retailers, 10 percent self-identified importers/wholesalers, and 5 percent others.
- Of those in retail, 22 percent are traditional brick-and-mortar retailer only, 55 percent at non-store retailers, and 33 percent are blended online and traditional retailers.
- Their titles include 10 percent in C-level positions, while over 60 percent are in management roles.





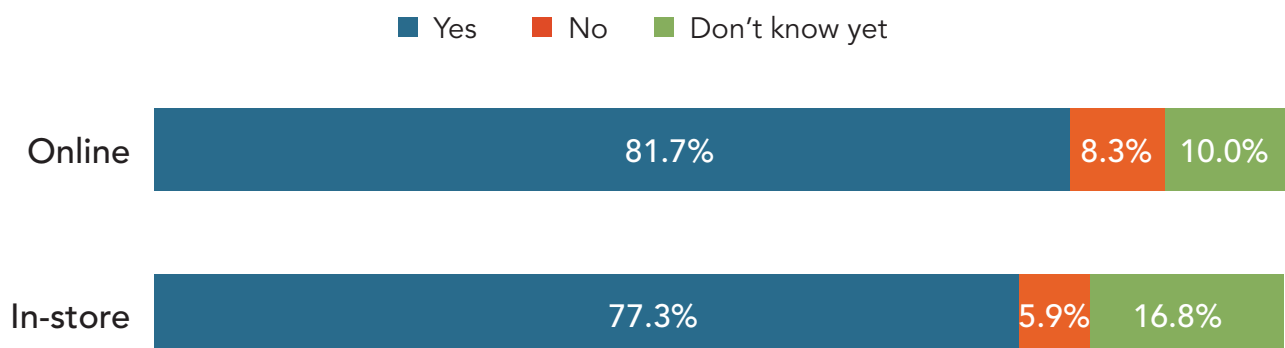
### Do You Plan to Implement e-Commerce Sales?



As 2017 closes out and companies look towards 2018, capturing a larger share of the online global marketplace must be more than just a footnote for those looking to remain competitive. Extensive planning is needed to address the risks identified with expanding online sales, including cross-border e-commerce and identifying the right sourcing opportunities.

Mitigating those risks requires finding the right technology and logistics partner to help meet and exceed consumer expectations.

### US Holiday Shoppers: Channels They Expect to Use to Buy Gifts This Holiday Season



Survey questions: Do you think you will buy gifts online this holiday season (i.e., via a computer, cellphone, tablet, etc.)? / Do you think you will buy gifts in physical stores this holiday season?

Base: 761 US Internet users ages 18+ who expect to buy gifts for holiday 2017

Source: FGRT

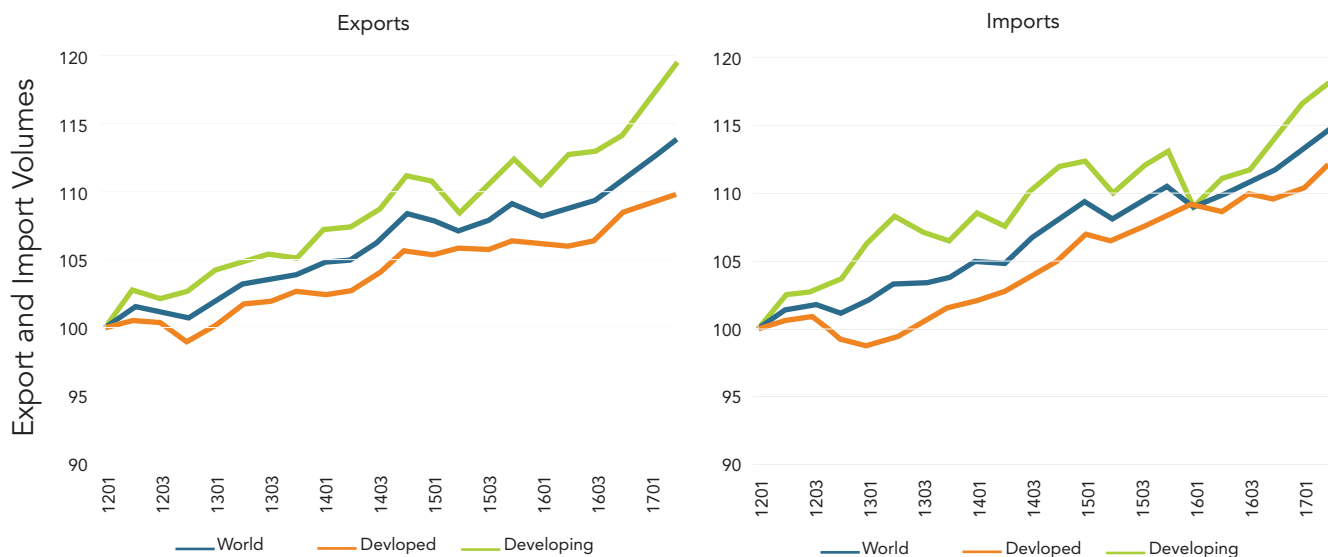
Any discussion of online sales and holiday shopping isn't complete without addressing the goliath of internet shopping. Three-quarters of all holiday shoppers plans to shop for gifts on Amazon this year, and of those who plan to shop online, nearly 83% plan to shop on Amazon. Among the attractions of online shopping, consumers cite avoiding holiday crowds, ability to compare prices, and a wider variety of products. Traditional retailers will be hard-pressed to lure consumers away from the mammoth online marketplace, so having a concrete plan to manage e-commerce sales is required to succeed. With the increasing trend of preferring online shopping over brick and mortar most prevalent among millennials and young families, the future of retail is looking more and more digital.

A positive outlook for the holiday season and uptick in consumer confidence has translated into higher trade growth output worldwide. Despite the lingering uncertainty driven by weather events, Brexit and protectionism, the World Trade Organization's (WTO) latest global growth forecast for 2017 was revised significantly upwards. Some statistics include:

- Revising the previous estimate of 2.4% growth in global trade for 2017 up to 3.6%, with a range of 3.2% to 3.9%
- The 2016 growth rate was only 1.6%
- Increases in quarter-on-quarter growth in China, the US and EU
- Import demand in Asia and North America driving stronger-than-expected growth
- Imports rose 2.1% in developed countries and 6.9% in developing economies in the first half of 2017
- Trade growth for North America was revised upward for both exports (from 3.2% to 4.2%) and imports (from 3.0% to 4.1%)



## Merchandise exports and imports by level of development, 2012Q1-2017Q1



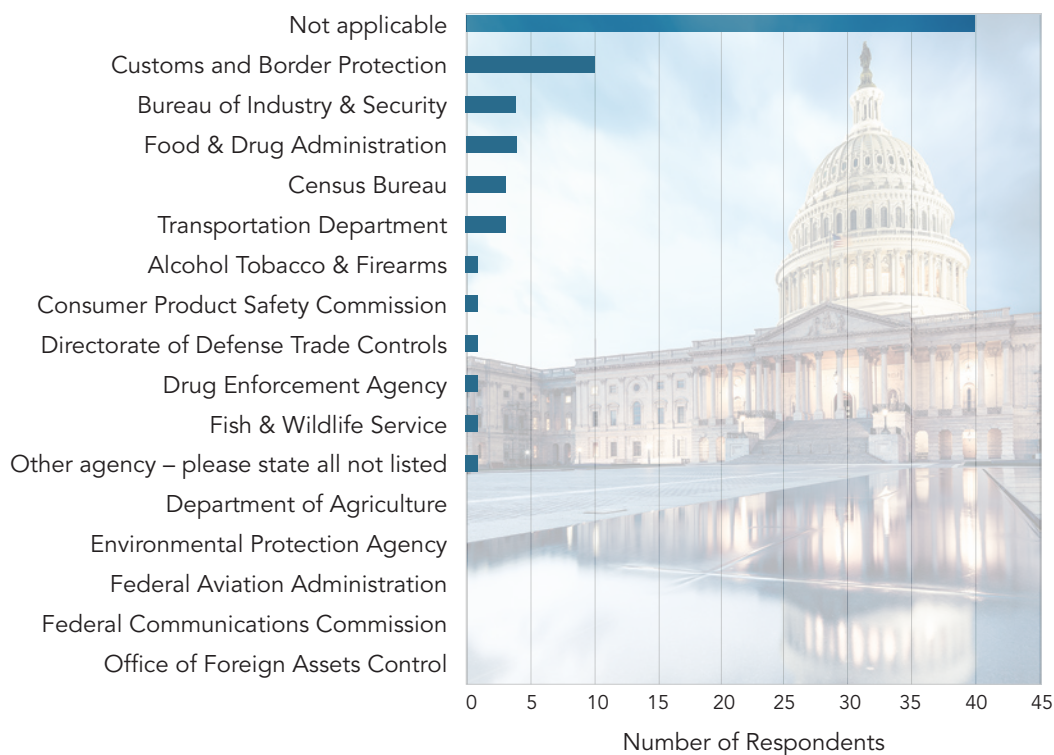
Source: WTO Secretariat.



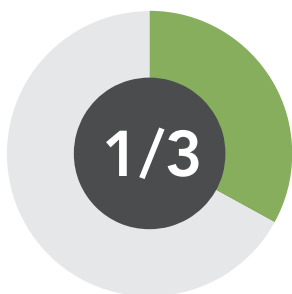
With more retail store closures than ever before, it's clear that the real driver behind this growth is e-commerce. Who is currently taking advantage of the burgeoning online marketplace? Among our survey respondents, 69% of companies have an online sales channel. The majority, or 56%, manage that channel internally, while 12% use a third-party. That leaves a gap where disruption can sideline shipments.

In the January report, we asked which US agencies impacted e-commerce shipments, offering a range of agencies to choose from. One-third of the importers have had adverse action with the Consumer Product Safety Commission (CPSC), while Bureau of Industry and Security (BIS), Customs and Border Protection (CBP), and the Directorate of Defense Trade Controls (DDTC) were ranked as next highest. But this data warranted a deeper look. We asked the question again in this new survey and the results show US Customs and Border Protection (CBP, Food and Drug Administration (FDA) and Department of Transportation (DOT) as the top three agencies – this makes more sense.

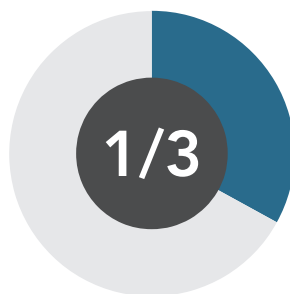
### Which agencies impacted your e-commerce shipments?



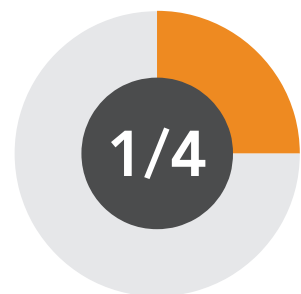
Resolving cross-border issues is key to ensuring the flow of goods, so we asked in our recent survey.



Managed with in-house staff



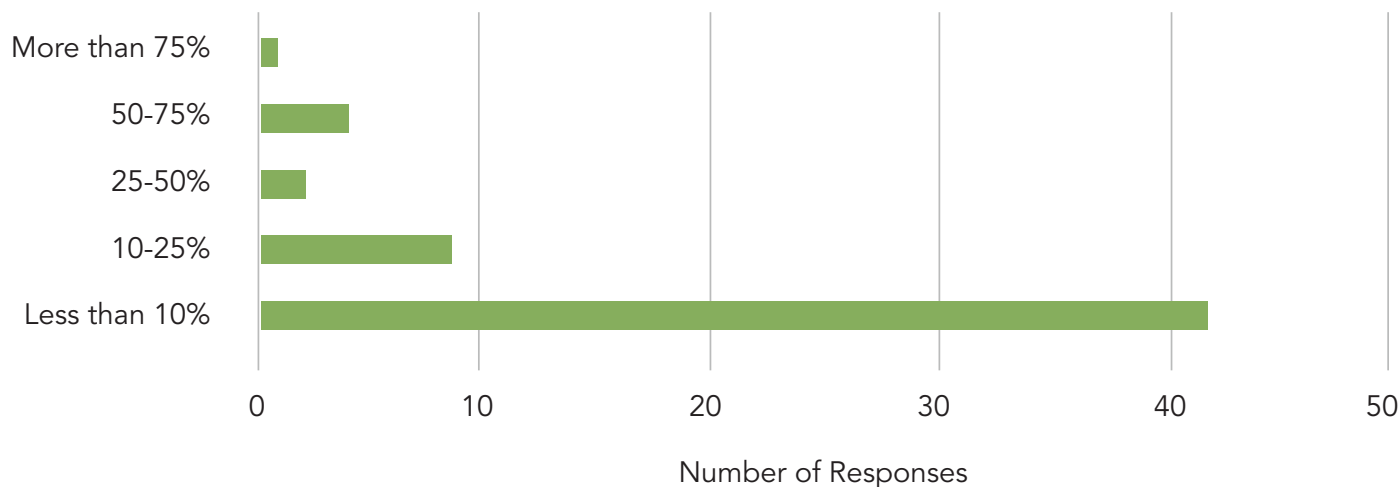
Managed with a trade professional  
outside of the company



Did nothing but let it  
work itself out

But to comprehend the reason why and knowing the complexity of trade documentation, we asked if documentation was a primary reason for shipment disruption at the border. Over 50% say paperwork is related to the delay less than a quarter of the time.

### How many were related to lack of documentation?



How well these online sales channels are managed and maintained as part of the global supply chain can make or break a company. The challenge of bringing consumers a seamless experience isn't limited to just product delivery, however. The companies poised for future success online start their digital transformation at the very beginning of the supply chain.





### Section 3: Utilizing Free Trade Agreements (or not)

The 2017 landscape of global trade shifted significantly from expectations in 2016. The Trans-Pacific Partnership agreement, which would have covered 40 percent of global commerce involving 12 Pacific rim nations, is essentially defunct following the US exit. The opportunity for duty-free trade with Japan, Vietnam, and Australia has flitted away, and sourcing decisions that were made with an eye to eventual enactment of the TPP may in hindsight look like bad ones.

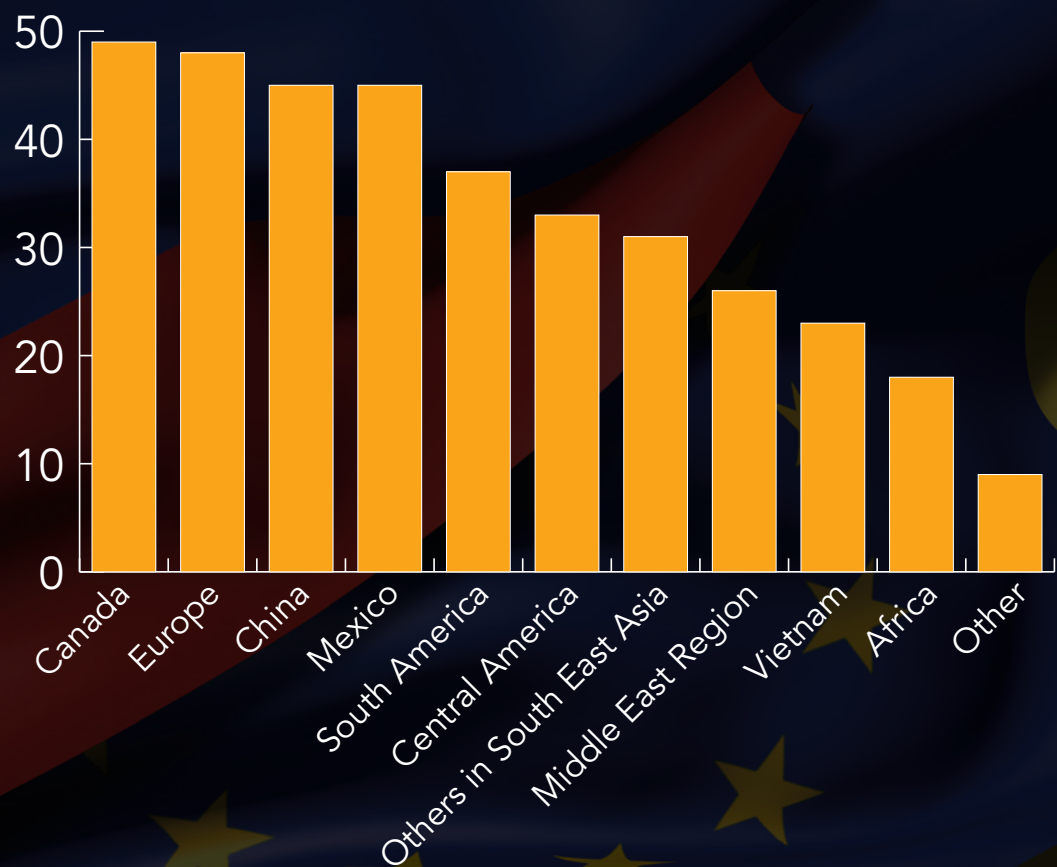
Companies that are well-insulated with a diversified sourcing base will fare better when unexpected events come to pass, or when expected events don't end up happening.

However, diversification doesn't come without risks. Survey respondents recognized the challenges of running a global supply chain, including speed-to-market, vulnerability to disruption, and the complexity of international trade compliance. Different sourcing locations each have their own unique set of considerations, including product quality and the potential for duty-free or preferential trade.

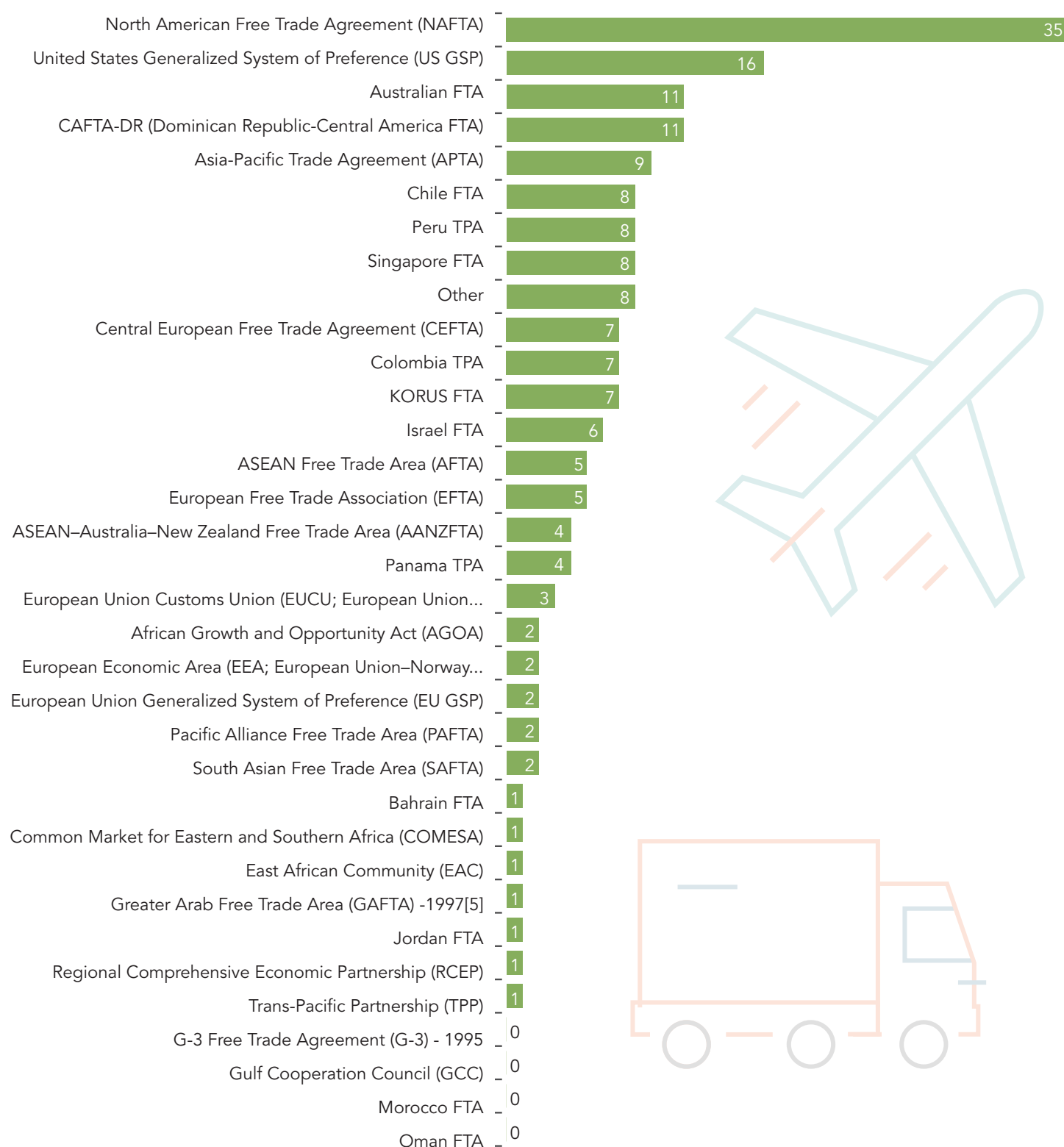
In this year's study, Canada was the top import and export destination, followed closely Europe, China, and Mexico.

Two of the top locations were in the Western Hemisphere, underscoring the importance of location for the supply chain. The North American Free Trade Agreement (NAFTA) also helps spur trade with Canada and Mexico. In terms of utilization of free trade agreements (FTAs), NAFTA takes first place among our respondents this year. Shipping to and/or sourcing from our neighbors to the north and south makes good business sense in terms of speed-to-market, and with duty-free trade thanks to NAFTA.

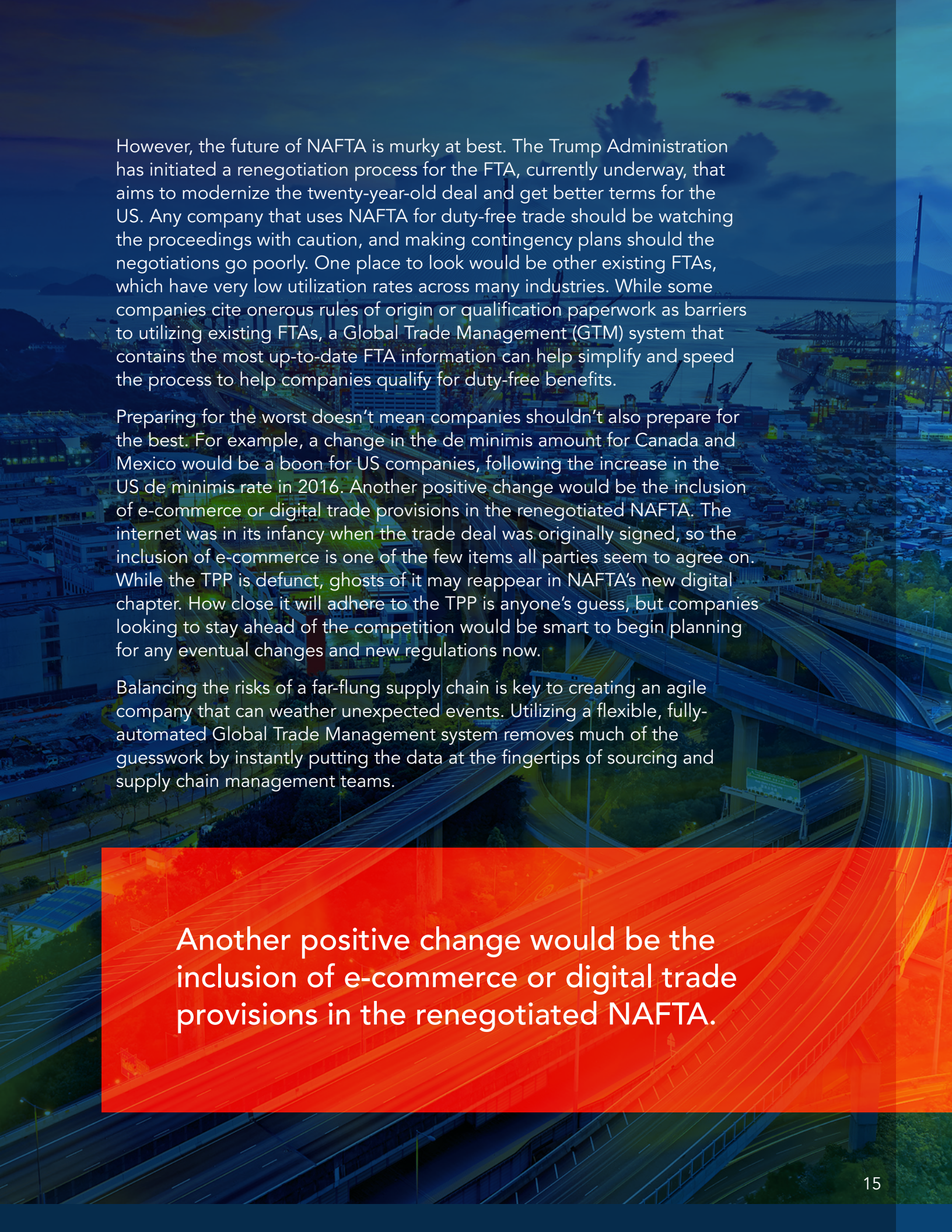
#### Top Import & Export Regions for US Shippers



## FTAs Utilized by Survey Respondents





An aerial night view of a port area with a large highway interchange in the foreground. In the background, there are industrial structures, including cranes and a large ship docked at a pier. The sky is dark with some clouds. The overall scene is illuminated by artificial lights from the port and the highway.

However, the future of NAFTA is murky at best. The Trump Administration has initiated a renegotiation process for the FTA, currently underway, that aims to modernize the twenty-year-old deal and get better terms for the US. Any company that uses NAFTA for duty-free trade should be watching the proceedings with caution, and making contingency plans should the negotiations go poorly. One place to look would be other existing FTAs, which have very low utilization rates across many industries. While some companies cite onerous rules of origin or qualification paperwork as barriers to utilizing existing FTAs, a Global Trade Management (GTM) system that contains the most up-to-date FTA information can help simplify and speed the process to help companies qualify for duty-free benefits.

Preparing for the worst doesn't mean companies shouldn't also prepare for the best. For example, a change in the de minimis amount for Canada and Mexico would be a boon for US companies, following the increase in the US de minimis rate in 2016. Another positive change would be the inclusion of e-commerce or digital trade provisions in the renegotiated NAFTA. The internet was in its infancy when the trade deal was originally signed, so the inclusion of e-commerce is one of the few items all parties seem to agree on. While the TPP is defunct, ghosts of it may reappear in NAFTA's new digital chapter. How close it will adhere to the TPP is anyone's guess, but companies looking to stay ahead of the competition would be smart to begin planning for any eventual changes and new regulations now.

Balancing the risks of a far-flung supply chain is key to creating an agile company that can weather unexpected events. Utilizing a flexible, fully-automated Global Trade Management system removes much of the guesswork by instantly putting the data at the fingertips of sourcing and supply chain management teams.

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## Section 4: Sourcing Challenges

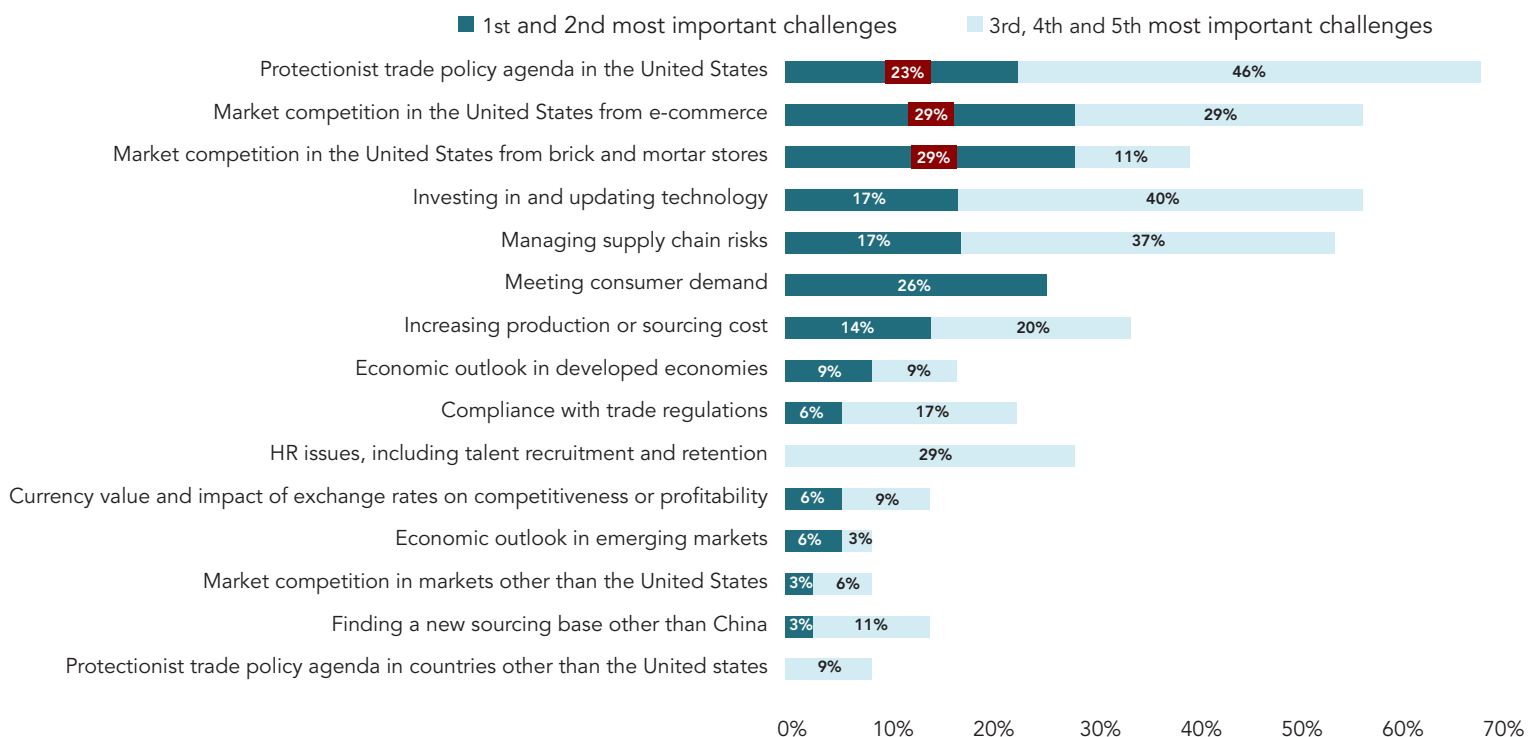
Sourcing is the heart of today's global supply chains, and decisions made on sourcing impact everything from transportation and shipping costs, to both social and regulatory compliance concerns. Many factors can affect sourcing decisions, from raw material availability to labor costs to FTA benefits or trade preference programs. When armed with all of the relevant data on current and potential sourcing locations in a digital format, supply chain professionals will enjoy a simplified decision-making process.

For 2017, the top business challenge for sourcing executives shifted from market competition due to e-commerce/brick and mortar stores to the protectionist trade policy agenda in the US. The US Fashion Industry Association (USFIA) benchmarking study saw the latter concern jump from 10th place in 2016 to first in 2017, a reflection of the change in Administrations and the President's often harsh words for global trade.

These concerns over protectionist policies, which include not just scrapping existing FTAs but also punitive tariffs against major trading partners like China, complicate sourcing decisions immensely. However, consumers will continue to shop and global commerce will continue to operate, so supply chain professionals must utilize technology to gather and analyze all available data, and use that to make the best choice possible.

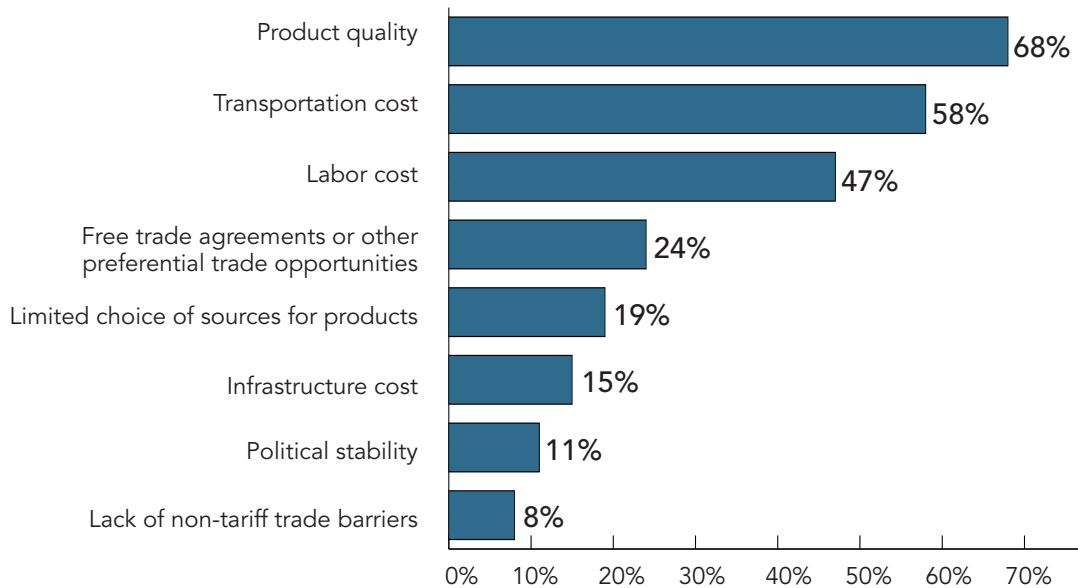
While it dropped from first to second place in 2017, almost 30% of companies ranked e-commerce competition as their top or second-highest concern. The best way to beat out the competition is to run a tighter ship, which means gaining complete control and visibility over your supply chain. When taken together with the other business challenges, it's clear why companies are racing to implement or improve their online sales channels.

### Top Business Challenges for the U.S. Fashion Industry in 2017



Source: US Fashion Industry Association (USFIA), "2017 Benchmarking Study"

Product quality was biggest concern for respondents to the survey, which had supply chain executives rank their most important consideration when choosing a sourcing location. Transportation costs ranked second, and labor costs ranked third. The low utilization rate is underscored by the importance of the top three considerations, it came in fourth with 24% making that a top consideration.



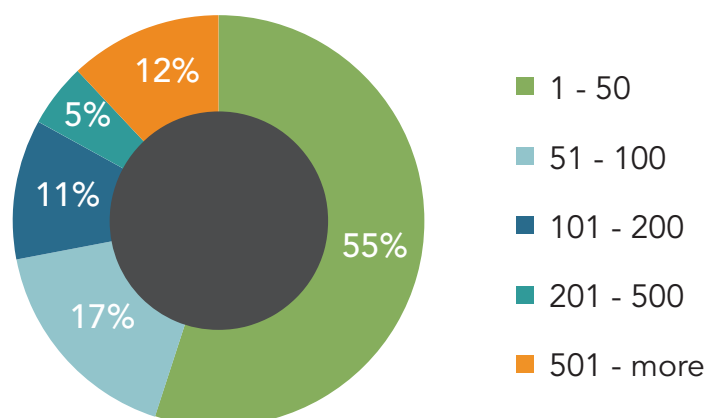
Source: US Fashion Industry Association (USFIA), "2017 Benchmarking Study"

Managing the transition to a hybrid online-physical presence, or even dropping physical locations to go completely online, is not a simple step. As stores close or are consolidated, the importance of warehousing and managing the logistics of the supply chain become entangled with growing the brand and meeting consumer demand. This brings concerns for transportation costs as we see as the #2 area of importance for sourcing.

Sourcing decisions can complicate or simplify this process. Of the companies we surveyed, 55% have between 1 and 50 tier 1 suppliers. Slightly over a quarter have more than 100, with 12% having 500 or more suppliers. And these are just tier 1, with many companies having up to four or five tiers of suppliers throughout their supply chains.

This complexity introduces additional risk into the supply chain. Managing multiple tiers of suppliers, which for the largest companies can number in the thousands, requires a sophisticated, cloud-based global trade management platform, with a fully digitized supply chain. Only this type of single system, rather than a disjointed mishmash performing siloed tasks, can effectuate close collaboration between companies and suppliers.

Number of Tier 1 suppliers





Collaboration is critical to improving the supplier selection and management process and effectively communicating the details of the product's design, materials and other specifications with all parties. This open communication will in turn positively affect the rest of the supply chain's performance, which is critical in the fast cycle times required by e-commerce.

By utilizing global trade management software, companies can streamline their supplier onboarding and management processes, jumpstarting the sourcing phase and optimizing their supplier selection decisions, including taking advantage of FTAs. Companies must have complete access to costing and sampling information, ensuring the product quality and cost are in scope before issuing orders. Companies who have consistent and timely access to supplier and product information can exceed consumer expectations with swift and interrupted speed-to-market.

Taking the complexity of sourcing decisions into account, a technology-driven global sourcing solution should provide the ability to:

- Streamline supplier on-boarding and management processes;
- Optimize supplier selection decisions, including taking advantage of preferential trade agreements, with contingencies in place;
- Share the bill of materials and product specifications online for real-time communication;
- Compare sample and product cost to evaluate a range of product, duty and shipment costs.



## Section 5: Assessing and Addressing Supply Chain Challenges

When it comes to e-commerce versus traditional retail, the main functions of the supply chain itself aren't extraordinarily distinct. Every company is concerned with the bottom line and with meeting consumer expectations, regardless of the sales medium used. Whether a product is destined to arrive in a storefront or directly to a customer's doorstep, it starts in the same place and travels along the same supply chain. The logistics of that movement, however, can differ as the product approaches its final destination. For cross-border e-commerce, shipments of single packages can bring even more transportation headaches than containers of goods, because they are often low-value with small margins, that doesn't leave much room for error.

Thanks to the expansive nature of today's global supply chains, there are numerous places where risk calculations must factor in. This year, we asked respondents, when assessing the business risks facing their organizations, where is their company most vulnerable?

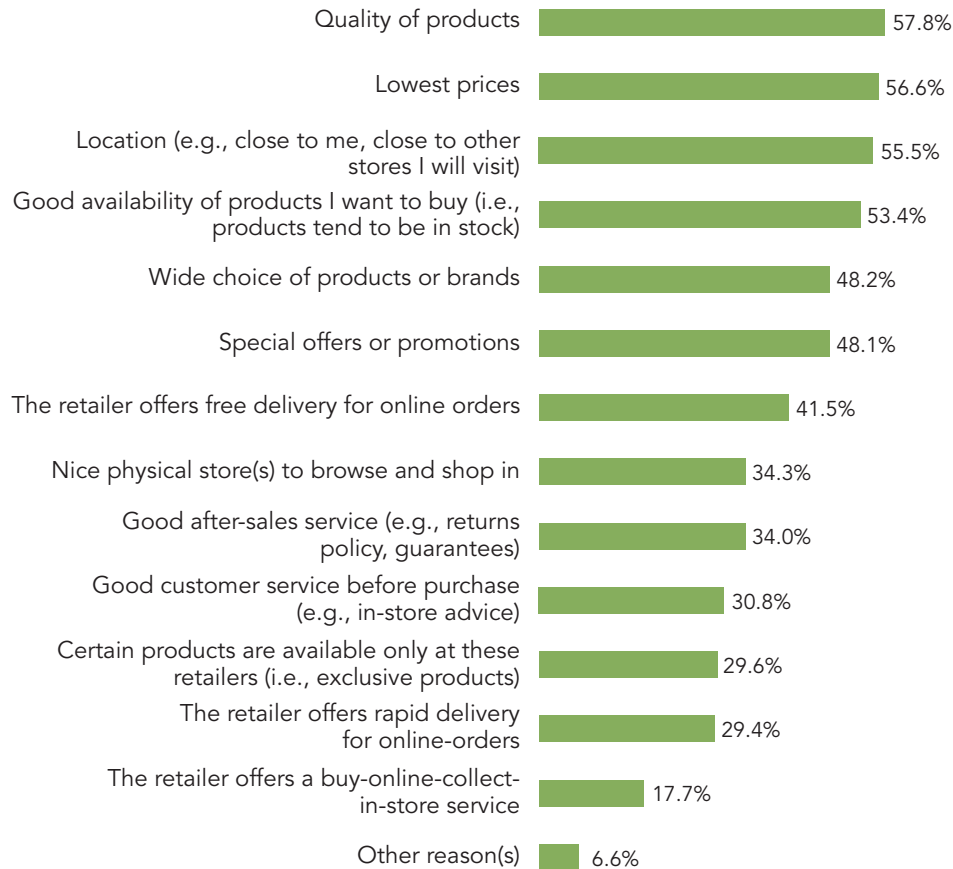
Responses were almost evenly split between several large, impactful concerns. The highest-ranking vulnerability reported was supplier risk based on product quality, with one-quarter making that their top concern. Another 21% said supplier risk based on capacity and stability, 20% said regulatory compliance risk, 19% said lack of staff to manage the supply chain, and 15% said transportation costs.



Product quality is an issue that can get enormously expensive for companies. Massive recalls such as the Galaxy Note7 recall in 2016, which was estimated at \$17 billion total cost, have more than just large price tags. Consider the logistics behind the return shipping process for over 2.5 million units, particularly in light of government regulations prohibiting certain types of batteries on airplanes.

For 2017 holiday shoppers, product quality will be the top concern when deciding where to shop for gifts. The US holiday shopping outlook reports that almost 58% of consumers see quality as the most important factor, followed by low price at 57%. Companies must ensure their products meet the high quality that consumers expect, or they will be hit with costly reverse logistics that drive up costs while taking huge bites out of profits.

## US Holiday Shoppers: Factors that Are Important When Choosing Where to Shop for Gifts



Survey question: Which of the following factors are important to you when deciding which specific retailers to shop at for gifts this holiday season?

Base: 761 US Internet users ages 18+ who expect to buy gifts for the holiday. Source: FGRT

With more online shopping comes more online returns. The costs can be astronomical, with NRF reporting the average return rate of 10% during the holiday season. Consumers have no qualms about returning products that don't meet their standards, so companies must be vigilant about product quality. One way to ensure vigilance is by implementing a glass pipeline, which provides visibility to every part of the process. Enhanced visibility brings traceability, which can help better manage recalls, if necessary.

The complexity of today's global supply chains brings an increasing vulnerability to unexpected supply disruptions, with more suppliers and contract manufacturers added into the supply chain. Yet many companies fail to leverage technology and integration to properly manage events like recalls, CPSC or Customs agency holds, or consumer/NGO inquiries.



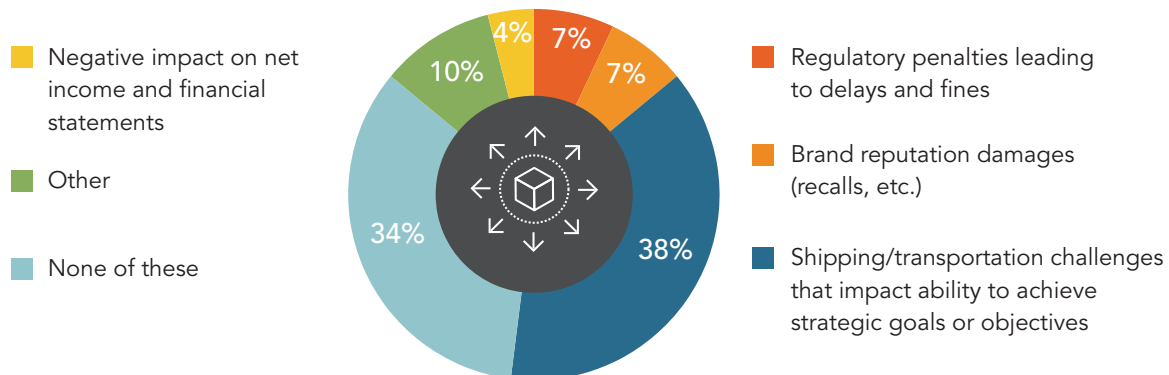
In the supply chain context, traceability helps companies connect the dots between the raw materials supplier, finished good manufacturer, product, and purchase order. This level of detail, provided in a digital supply chain environment, can also help to manage social and environmental responsibilities, enhance product quality, and maintain regulatory compliance.

The second-highest vulnerability reported in our survey also had to do with supplier risk, but this time on the capacity and reliability side. A fully digitized and visible supply chain can help manage supplier capacity on the fly, and a diversified sourcing base allows a company to swiftly shift production as needed should a supplier fail to meet expectations. This intelligence needs to be delivered immediately, so companies can get ahead of problems and proactively make changes.

Regulatory risk compliance is also mitigated through a state-of-the-art Global Trade Management (GTM) system that puts global trade knowledge and Harmonized Tariff Schedule (HTS) numbers at your fingertips. Proper classification of goods is required to avoid costly delays and detentions at the border, getting goods into consumers' hands on time.

We asked survey respondents which issues their e-commerce channel has experienced. Just over a third of respondents report that the largest impacts come from shipping and/or transportation challenges that impact ability to achieve strategic goals or objectives.

### Impacts on e-Commerce Channels



As more and more people order online, the logistics of e-commerce shipping becomes ever more complex. To meet the growing demand, the Wall Street Journal reports that logistics companies have already stepped up their hiring in anticipation of the 2017 holiday season. Package delivery companies added 3,900 jobs in August, the fifth straight monthly increase and a sign of the times as more people order items delivered to their porches. The parcel sector also added 7,000 jobs in two months and more than 30,000 in the past 12 months. In addition, the warehousing and storage sector also added 900 jobs in August, all driven by the e-commerce boom.

While throwing more people into the mix may alleviate some delays, the best way to mitigate shipping and transportation challenges is by having full visibility and accountability with all shipping partners. By working together in a single, cloud-based GTM, companies can submit and track package manifests, update consumers with instant tracking data, and analyze how their partners are performing. A digital GTM platform should also have the ability to provide rate and route information for parcels. This level of communication and collaboration is only reachable when all parties are on the same page, or in this case, the same system.

## Section 6: The Road Ahead

Beating the challenges inherent in running a global supply chain and capturing the e-commerce wave requires the right tools for the job. The first step to becoming a true 21st century company is digitization, as the old ways of doing business get put aside for a leaner, faster, more connected supply chain. The consumers are already online and growing in numbers each year. Taking your business online to meet them is one of the few avenues for sustained growth amidst a sea of store closings.

Companies must also begin to embrace uncertainty as the new norm. Geopolitical events, protectionist policies, and weather catastrophes can't be controlled, but they can be planned for. Balancing these risks requires proactively seeking out new sourcing locations that can benefit not just the company's bottom line, but also the company's brand and social cachet.

Risk management is incredibly important—even more so with the fast turnover times of e-commerce—and automated supply chains can help make that an integral part of operations. Companies can better position themselves to weather risk and uncertainties by making their supply chains more resilient.

GTM systems that tackle these tasks and more can proactively mitigate risk:

- Connecting all business partners in a single, integrated, cloud-based platform
- Diversified sourcing options with all benefits and risks clearly illuminated
- Enhancing visibility of supply chains, including second, third, and even fourth-tier suppliers
- Collaborating with suppliers, transportation and logistics providers in real-time
- Improving control of key operational and quality control processes
- Enhancing agility to improve responses to adverse changes in external environments
- Proper product classification, accurate costing, and export/import compliance documentation

## About the Author



Gary M. Barraco is the Global Product Marketing Director at Amber Road, where he is responsible for developing strategic product marketing direction and presenting the Amber Road brand and solutions worldwide. As the platform evangelist, Gary develops and launches customer insights, go-to-market plans, product messaging and content, as well as field marketing tactics which establish Amber Road's solutions as a standard in the Global Trade Management space.

Previously, Gary was VP, Industry Development for ecVision for 9 years prior to its acquisition by Amber Road. He has 20 years of active military service where his primary specialty was providing marketing support to Army National Guard recruiting and retention operations in New Jersey.

Gary received a BS from the State University of New York and is currently pursuing a Master's degree at Moravian College. He is co-chair of the US Fashion Industry Association Education & Training Committee, and member of American Apparel and Footwear Association, Footwear Distributors Retailers Association, Outdoor Industry Association, Council of Supply Chain Management Professionals, and American Association of Exporters and Importers, where he serves on various committees and planning groups.

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## Amber Road

Amber Road's (NYSE: AMBR) mission is to dramatically transform the way companies conduct global trade. As a leading provider of cloud-based global trade management (GTM) software, trade content and training, we help companies all over the world create value through their global supply chain by improving margins, achieving greater agility and lowering risk. We do this by creating a digital model of the global supply chain that enables collaboration between buyers, sellers and logistics companies. We replace manual and outdated processes with comprehensive automation for global trade activities, including sourcing, supplier management, production tracking, transportation management, supply chain visibility, import and export compliance, and duty management. We provide rich data analytics to uncover areas for optimization and deliver a platform that is responsive and flexible to adapt to the ever-changing nature of global trade.

Our e-commerce solutions provide a holistic platform that streamlines global trade management and improves customer experience. For more information, please visit [www.AmberRoad.com](http://www.AmberRoad.com), email [Solutions@AmberRoad.com](mailto:Solutions@AmberRoad.com) or call 201-935-8588.

## AAEI

AAEI is the premier trade organization representing U.S. companies engaged in global trade. We are recognized as technical experts regarding the day-to-day import and export of goods including the facilitation of global trade.

AAEI advocates on behalf of U.S. companies on trade policy issues before the U.S. Congress, trade compliance practices and operations before Executive Agencies, and multi-lateral organizations including the World Trade Organization and the World Customs Organization.

AAEI plays an important role in providing education to international trade compliance professionals through its ten (10) standing committees which review proposed trade policy and regulations for comment, off-the-record webinars with government officials, and the Association's annual conference, seminars and trade briefings.

Learn more about AAEI at [www.AAEI.org](http://www.AAEI.org).





## AAEI Board of Governors (2017-2018)

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John Sega	Northrop Grumman Corporation
Ted Sherman (EC)	Target Corporation
Theresa Walker (Chair-Elect)	Cargill, Incorporated
Phylliss Wigginton (Chair Emeritus)	Mitsui & Company (USA), Inc.
Kevin Willis	Amazon

