

WHITE PAPER

e-Commerce Impacts Global Trade

2017 AAEI e-Commerce Benchmark Report



Introduction



AAEL is proud to partner with Amber Road on this first **Benchmark Report on e-Commerce**. While e-commerce is not new, it has reached a critical mass to impact global trade. Since the Great Recession of 2008, global trade has remained flat while e-commerce has increased 20% per year.

While the disruptive force e-commerce has on the economy appears most prominently in the retail sector, this latest digitalization of trade will continue to change industry trade patterns and product distribution for years to come.

Even government is not immune from the effects of e-commerce, as Customs administrations struggle to cope with how to regulate e-commerce since the current legal regimes are designed to collect revenue at the point of entry on large volume shipments.

AAEL is privileged to serve as the private sector co-chair of the *World Customs Organization's Working Group on E-Commerce*, which convened in September 2016, and brought together customs administrations, the private sector, academic institutions and international organizations to develop framework for processing the cross-border shipment of low value e-commerce shipments. Among the initial challenges in developing such a framework is understanding the size of e-commerce in relation to overall global trade and other metrics.

We hope that this report is the first annual benchmarking survey taking a snapshot of e-commerce trade. Having Amber Road as an AAEL Strategic Alliance Partner enables AAEL to contribute to the body of knowledge studying the consumer driven "omni-channel" distribution of goods.

We want to thank all the companies who participated in the survey, and hope that this report provides useful information and insights.

A handwritten signature in black ink that reads "Marianne Rowden".

Marianne Rowden
President & CEO
American Association of Exporters and Importers

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Section 1: Executive Summary

Throughout 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 the impact the colossal growth of online sales, especially cross-border online sales, has on retailers, manufacturers, shippers and others.

Our goal is to conduct these surveys on an annual basis, allowing us to review year-over-year data and trends. For this inaugural report, we begin with the world's current scenario.

Three-quarters of the survey respondents already have an online sales channel in place, while 65% of those who are not selling via the web today plan to in the near future. This statistic supports the global shift from brick-and-mortar retail to e-commerce. With growing internet penetration, a consistent customer shift from store to web shopping, and the proliferation of smartphones and tablets, the growth of online shopping has been massive.

While there is clearly a large market opportunity associated with global e-commerce, a number of challenges must be addressed when considering this strategy. Companies, including retailers, consumer products, 3PLs, e-commerce marketplaces and others need to create a comprehensive plan and consider partnering with solution providers experienced in global trade regulations and practices. The imperatives identified in this report are a starting point for establishing a strategy, growing revenues globally and delivering a positive global e-commerce experience for consumers.

The sophistication of cloud-based, global trade management systems means organizations can simplify their operations and provide customers with a positive shopping experience.



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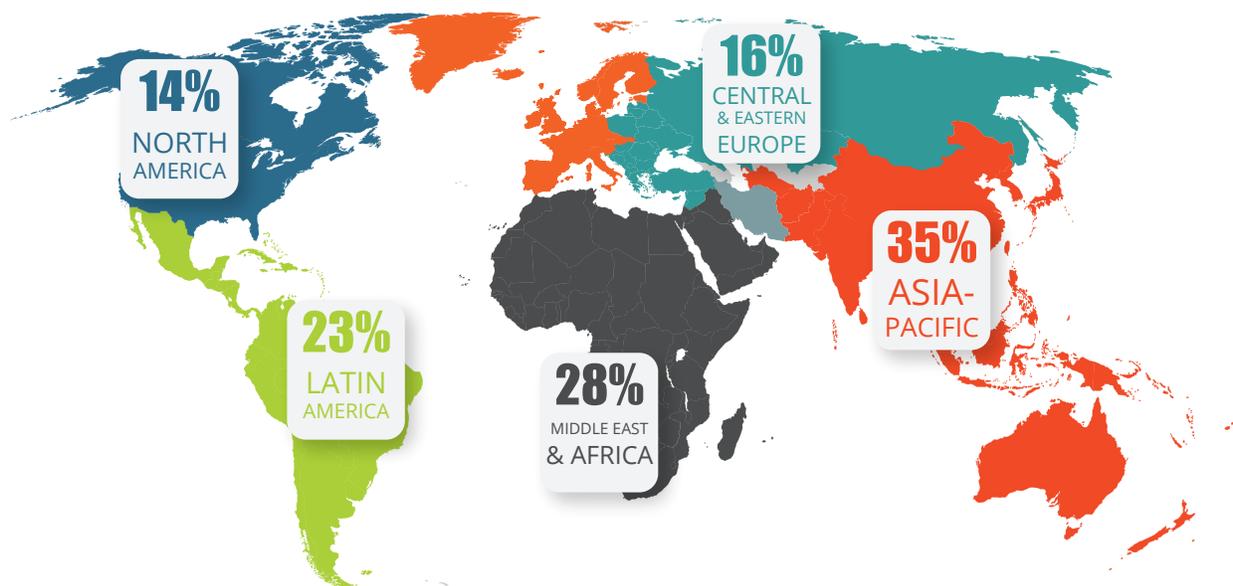


Section 2: The e-Commerce Explosion

During 2016, supply chains were riddled with disruptions at every turn. In January, analysts predicted positive trends and a big trade uptick, but forecasts fell short when global trade was hit with numerous interruptions, driving importers and exporters scrambling to stay on course.

We rang in the New Year looking ahead to the implementation of numerous import, export and tariff agreements. The Information Technology Agreement (ITA), Automated Commercial Environment (ACE) and IMMEX (Maquiladora) Program were all expected to alter the way business was conducted. But we soon saw repeated delays as government officials realized the Goliath effort it takes to roll-out new technology platforms across multiple agencies. By February, worldwide air and ocean cargo shipments were showing signs of decline, which continued all year. Spring approached with increasing military, geopolitical and labor unrest, along with the continuing refugee crisis in Europe. Britain's June vote to exit the EU started the global tide of protectionism which permeated the U.S. presidential election and led to what is now termed "de-globalization." Cargo theft figures reached the multimillion-dollar mark and weather hampered shipments, leading to the Hanjin line bankruptcy headache that stalled shipments in a quagmire of legalese, and the further consolidation of ocean carriers caused by troubling business woes.

As the industry whirled to stay ahead of all this, retailers closed thousands of brick-and-mortar locations to focus on overwhelming sales over the web instead.



Source: OG analysis and eMarketer. July 2015

The challenges the industry faced in 2016 have carried over into 2017. However, the pace of change has only accelerated, completely redefining what it means to be agile and responsive. Alongside domestic online sales, global e-commerce grew in leaps and bounds, particularly in emerging markets where consumers can find it hard to locate affordable imported products in local shops. However, these significant global sales opportunities also present the challenge to deliver a positive customer experience while combatting high shipping fees, hidden costs, import and export regulations, and product restrictions.

The upsurge of online shopping grew to historic proportions in 2016, with both positive and negative effects on retailers. Here is a list of 2016 predictions:

- The web will account for **12.8%** of global retail sales by 2019¹
- Global cross-border B2C e-commerce sales are forecast to hit **\$1 trillion** in 2020²
- e-Commerce sales will outpace brick-and-mortar sales growth by a more than 3-1 margin³
- e-Commerce will eclipse **\$3.5 trillion** by 2020⁴
- **40%** of consumers have purchased goods from another country⁵
- **48%** of companies now do business in more than 50 countries⁶
- **35%** of companies now realize more than half of their total sales from international markets⁷

As the year transpired, it became apparent that e-commerce was going to have a much larger impact on our economy than originally anticipated:

- Nearly 1/3 of consumers and nearly half of parents began holiday shopping before Labor Day⁸
- **73%** of 2016 holiday shoppers planned to shop online⁹
- Thanksgiving through Cyber Monday online sales reached **\$12.8 billion**¹⁰
- Between Nov. 1 and Dec. 31, online sales hit **\$91.7 billion**, up 11% from \$82.5 billion a year ago¹¹
- Americans spent on average \$1,175 per person for the 2016 holiday season, showcasing a 12% increase over last year, and **73%** shopped online¹²
- UK shoppers spent **£133 billion** (\$164.57 billion) online last year, which was a 15.9% increase from £114.75 billion in 2015¹³

1 e-Marketer, Worldwide Retail e-Commerce Sales: e-Marketer's Updated Estimates and Forecast Through 2019, 2015

2 Ibid

3 Ibid

4 Accenture and Alibaba, Cross-border B2C E-commerce Market Trends, April 2016

5 SCM World, Managing Global Trade – Rising Importance But Lagging Execution, July 2013

6 Ibid

7 Pitney Bowes, Global Online Shopping Study, 2014

8 Rubicon Project, Holiday Consumer Pulse Poll, October 2016

9 Market Track, 2016 Holiday Shopping Survey, October 2016

10 Practical e-Commerce, Sales Report: 2016 Thanksgiving Day, Black Friday, Cyber Monday, December 2016

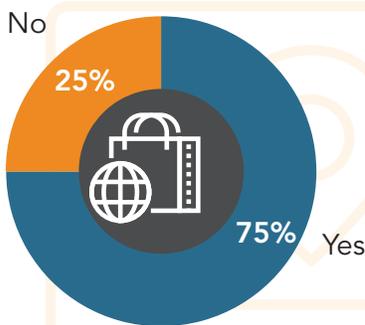
11 Fortune Magazine, Online Sales Holiday Shopping, January 2015

12 Rubicon Project, Holiday Consumer Pulse Poll, October 2016

13 IMRG Capgemini e-Retail Sales Index, January 2017

Conclusively, the size and potential of e-commerce sales is too lucrative to pass up. The swing into full-on e-commerce offerings is true for 75% of the survey respondents, and of the remaining group that doesn't currently have an online sales channel, 65% plan to implement something. Of the companies in our survey that sell online, 95% have an optimistic experience – 51% showing an uptick in sales via this channel.

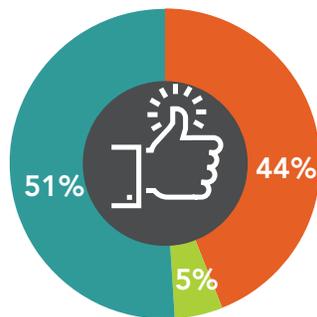
Does your organization currently offer an online sales channel?



If no, does your organization have plans to implement e-commerce sales?



Has your business experienced an upsurge or decline in web-based/ e-commerce sales in the last 12 months?



- Remained the Same
- Decline
- Upsurge

This data, along with the fact that respondents experience more than half of their sales (55%) from online channels, is indicative of the new retail dynamic. Companies wanting to mitigate the risks and challenges of brick-and-mortar locations will turn increasingly to e-commerce. Now it is time to fine-tune company operations to streamline and improve efficiency.

Section 3: Brick-and-Mortar Takes the Fall

Traditional retailers are still struggling to both compete with online retailers (or their own multi-channel) and align their supply chain operations to meet the needs of their consumers. According to the Wall Street Journal, 2016 spending rose 11% at online retailers and fell almost 6% at department stores. The figures show that while the retail economy is getting stronger, companies still are scrambling to change their supply chains as fast as consumers are changing buying patterns.

Traditional retail started taking hits early in 2016 when the Sports Authority announced its bankruptcy and closed all 460 stores, liquidating all of its assets within months. A number of additional retailers delivered disappointing in-store sales. The following stores have suffered as a result of the move to online retail, announcing a number of store closures – for now.

Macy's - 100+	Fossil - 160	Marks & Spencer - 75
Wal-Mart - 269	Office Depot - 300	Finish Line - 155
JCPenney - 80	American Eagle Outfitters - 150	Abercrombie & Fitch - 1
Claire's - 72 U.S. & 26 EU	Walgreens - 200	Sears - 75

In January 2017, women's apparel retailer The Limited reported it will close down its 250 brick-and-mortar stores, yet build-out an online presence and shift its sourcing operations to fill that channel. What do all of these retailers have in common? Their brick-and-mortar businesses.

Figure 1: December Stats for In-Store vs. Non-Store Sales



Source: U.S. Dept of Commerce



Source: U.S. Dept of Commerce

Not all retailers are shuttering their stores, however; some online retailers are opening physical locations to serve as showrooms or fitting rooms. Bonobos and Amazon are setting up stores where customers can go to actually feel, inspect and try-on goods before buying them. The customer will walk out empty-handed though, and their purchase will be shipped from an offsite distribution center (DC) delivered to whichever address the customer provided (probably by the next day). A number of online companies have introduced a physical presence to better market their products, forge closer customer relations, and ultimately enhance online traffic and sales. Amazon aside, these include mostly specialty and clothing stores such as Warby Parker, Bonobos, Birchbox and Casper.

Ultimately, more than one industry is impacted by the shift from traditional retail – both positively and negatively. As reported in Capgemini’s Digital Transformation Institute, titled *Making the Digital Connection: Why Physical Retail Stores Need a Reboot*, consumers are satisfied with the new experience and non-reliance on traditional retail. Nearly 60% are open to buying directly from manufacturers in the future. “Overall, 71% of consumers would consider bypassing traditional retailers, but this attitude is most prevalent in China, where well over three quarters (87%) of respondents would consider alternatives.”

Repercussions of this shift are rippling throughout the entire ecosystem. Along with the laying off of store employees, other businesses centered around stores like restaurants are experiencing slower traffic, and distribution centers and logistics providers are slowing down operations. Mall operators and real estate companies are also taking it on the chin, and of course, there is the loss of tax revenue for local, state, and federal governments.

The outlook for traditional retailers is bleak, but there is hope if they can provide a fresh concept for shoppers – creating an innovative experience is the key component.

When traditional retailers began launching an online presence years ago, operations were typically segmented: marketing, sales, fulfillment, supply, etc. But as society has swung to a new shopping dynamic (buying via multiple channels), more retailers are integrating their teams from two distinctive operational divisions into one. While it sounds like a simple concept, it can be difficult to execute.



The outlook for traditional retailers is bleak, but there is hope if they can provide a fresh concept for shoppers – creating an innovative experience is the key component.

Section 4: The Industry's Challenges

Companies providing global e-commerce services must understand their customers' needs for convenience and remove any obstacles for embracing cross-border commerce. These obstacles include an ever-changing global trade environment, tariffs that vary by country, and conflicting classification requirements. To fully address these challenges, it's imperative to maintain timely access to global trade information, master product classification, and comprehensively calculate landed costs at the time of order entry.

However, global sales opportunities also present the challenge to deliver a positive customer experience while combatting high shipping fees, hidden costs, inaccurate duties, import and export regulations, and product restrictions. There are other obstacles that need to be overcome too:

- Technology is changing rapidly, especially on the consumer side, which sets the bar higher for selling not only to current customers, but also to a new generation of customers that desire the ability to purchase products easily across the globe.
- Increased competition from non-traditional sources such as Amazon, Alibaba and manufacturers selling directly to the consumer forces companies to rethink their e-commerce business model and grow global opportunities.
- Mobile devices have changed how customers interact with businesses and must comprehensively support the nuances of global commerce. When added to the increasing availability of internet access worldwide, you have a perfect storm of rapid growth and increased demand.
- Customer expectations have increased in recent years for self-service capabilities, customer service and other factors. It's imperative that your e-commerce process accounts for all cross-border fees and regulations to ensure a positive customer experience.
- Global trade regulations are constantly increasing and changing worldwide. In the U.S. alone, the change in administration is sure to bring the dismantling of existing trade agreements, the scrapping of pending agreements, and a lack of focus on easing cross-border trade overall. As a result, your organization requires streamlined access to current government regulations and international business rules to ensure e-commerce compliance.

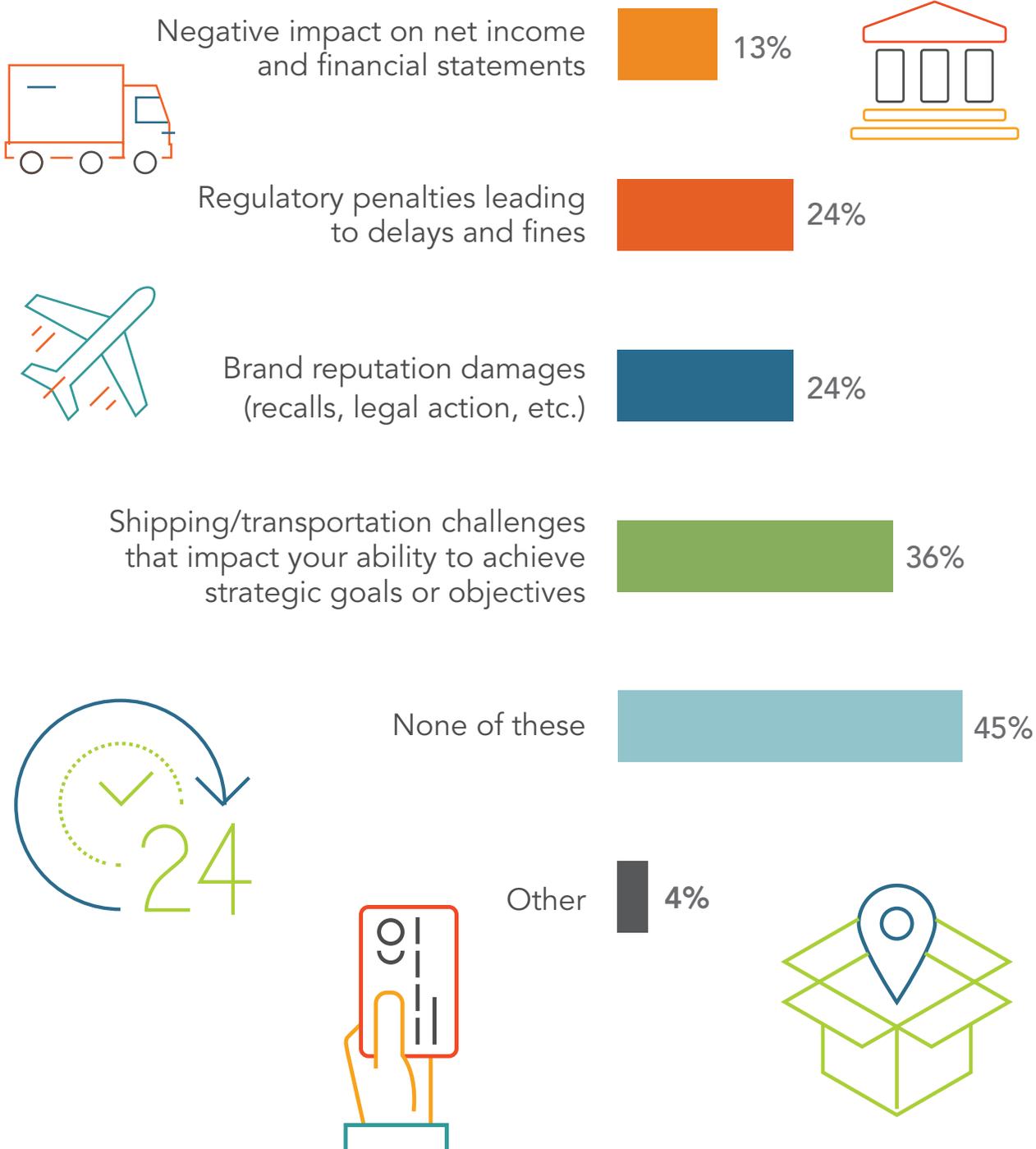


- During 2016, risk and security concerns were heightened to levels that led to millions of dollars in losses. Natural disasters from inclement weather, unexpected quality issues (Samsung is an excellent example), growing exposure to differing and global regulatory requirements, geopolitical instability in the Middle East and other regions, and global cargo theft all posed serious issues.
- Then there is the reverse logistics problem – according to the National Retail Federation, up to 30% of online holiday purchases are returned to the physical store or shipped back to distributions centers, compared with about 10% of holiday purchases overall.
- e-Commerce transactions are no different than others when it comes to import/export requirements. Our survey responses show that e-commerce operations encountered a range of problems:
 - Nearly 36% experienced shipping/transportation challenges that impact retailers’ ability to achieve strategic goals and objectives.
 - 24% stated that they are concerned with regulatory penalties leading to delays and fines.
 - 24% are concerned about brand reputation damages (recalls, etc.).
 - 29% of the survey participants had already experienced delays, fines, and damage to their brand reputation as a result of regulatory penalties.

The global trade professionals participating in our survey were asked to assess the business risks facing their organization, where they are most vulnerable. The number one concern is cybersecurity, leading us to begin planning a deeper review of this topic to understand their fears. But the second and third highest concerns are a sign of the times: regulatory risk (stemming from trade violations, fines, delays due to lack of documentation, recalls, etc.) and operational risk (staffing, security, product safety, and quality issues). The third highest concern is for supplier management, reflecting a change in that critical aspect of the supply chain.

e-Commerce transactions are no different than others when it comes to import and export requirements.

Has your e-commerce channel experienced any of the following issues? (Please check all that apply.)



Section 5: Enabling and Streamlining to Seize the Opportunity

Vince Lombardi was referring to football players when he said, “Many have the will to win, but few have the will to prepare to win.” However, this statement can also be applied to the industry’s ability to handle e-commerce during the 2016 holiday season. While e-commerce is the dominant driver for global economic growth, there are multiple elements necessary to do it right.

The ability to address this growth opportunity requires the implementation of global trade management technology and process changes that can ensure your online sales operation runs like the giant marketplaces who have dominated the space. When all totaled, the sales yielded from e-commerce are huge, yet transactionally they aren’t so impressive. Most (68%) of our respondents (companies moving 10,000 plus containers annually) have an individual transaction price below \$100, making every added cost during sourcing and shipping count.

For organizations to strengthen their competitive advantages in the cross-border e-commerce market, primary gaps must be addressed with a combination of technology, trade compliance knowledge, and automation. On the highest level, organizations need these key building block capabilities for an efficient e-commerce infrastructure:

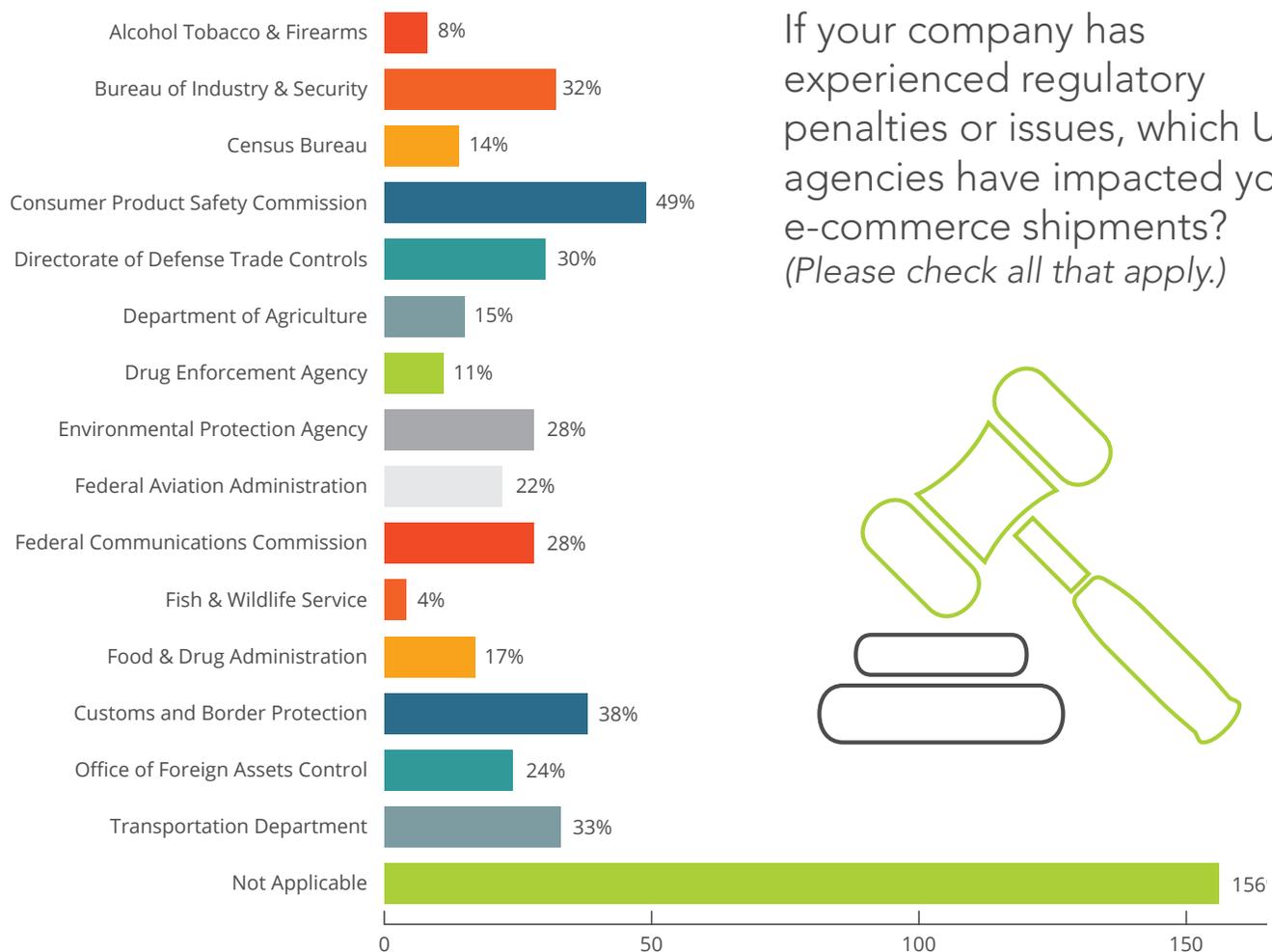
- Being able to properly classify goods based on descriptions from product catalogs, country of export, and each consumer’s desired country of import is essential. Consumers expect a quick and easy online buying experience, which requires accurate product classification in real time for cross-border orders. All countries require and rely on the International Harmonized System (HS) to properly classify products. As a result, Customs requirements are routinely identified based on the HS code, and are required at the time of order to deliver a positive customer experience.
- Having a strong database for global trade content is the core of any GTM solution. This is where the most current information can be used in the functional areas of an automated import/export technology platform. Screening tools can be used to determine if a party to the transaction is on a sanctioned party list, or if the goods being shipped are prohibited or restricted in any way. Alerts will notify the user base of any newly added or removed countries, products, or individuals, thus ensuring compliance.
- The same holds true for any regulatory agency that may be involved at any point coming into the U.S., or possibly outside the U.S. (typically handled through brokers). Staying up-to-date on all documentation required for a seamless experience can mean the difference between paying penalties and making - or missing - shipping commitments.

68% of our respondents (that move more than 10,000 containers annually) have an individual transaction price below \$100, making every added cost during sourcing and shipping count.

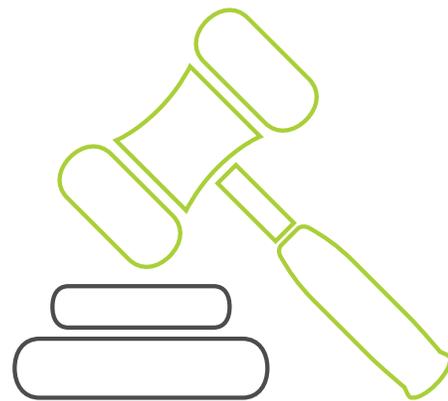
A close-up photograph of a dark grey credit card. The card is positioned diagonally across the frame. The numbers '52330' are embossed in a metallic, reflective font on the card's surface. To the left, a black keyboard key with the number '8' is visible. The background is blurred, showing a blue object and a white surface. The overall lighting is soft, highlighting the texture of the card and the key.

52330

8



If your company has experienced regulatory penalties or issues, which U.S. agencies have impacted your e-commerce shipments? (Please check all that apply.)



In our survey, we asked which U.S. 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 the Bureau of Industry and Security (BIS), Customs and Border Protection (CBP), and the Directorate of Defense Trade Controls (DDTC) were ranked as next highest.

- Every one of the components discussed has the potential to alter the landed cost of the product due to fees, penalties, or premium routing. For e-commerce, it is critical to the profitability of the business that these costs are constantly captured and accumulated through a costing application that monitors the transaction points for international shipments. Automation has dramatically improved the ability to track and accumulate these costs, which determine the pricing to the customer and ultimately the profitability of the product.
- In addition to the GTM solution components required, there are transportation and visibility capabilities needed to provide a streamlined e-commerce transaction. Reliable, real-time order and logistics tracking systems are a must for customers and customer support teams to monitor delivery to the final location. In the International Post Corporation January 2017 report, *Cross Border e-Commerce Shopper Survey 2016*, those online consumers who are not offered shipment tracking feel it is an important feature, illustrating that consumer demand drives requirements. But still, 84% of survey respondents in that survey used online status tracking tools.

Figure 3: Steps for e-Commerce Enablement



In Figure 3 above, you can map the flow of a typical e-commerce transaction from the GTM perspective. When products are selected for selling on the e-commerce platform, the GTM system is used to assign a production classification for the many combinations. At the point of sale, actual landed cost calculations, including taxes and duties are calculated and presented to the shopper, Customs documentation requirements are identified, and sanctions/denied party screening is conducted. Pack and ship alerts are triggered to internal parties and the customer, while shipment information is also communicated.

The colossal success of e-commerce sales is the catalyst for major changes in how global business is making, selling and moving products to satisfy customer demand. However, most companies don't have a single technology solution to satisfy the needs of today's GTM scenario. In our survey, a large number of participants (48%) are managing their e-commerce channel internally, but none have every piece of the total solution.

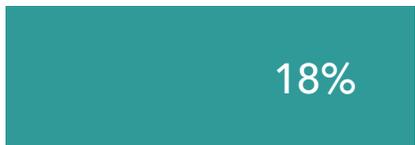
The competition in the e-commerce arena is only going to heat up and get more challenging for retailers. Businesses have no shortage of options when it comes to new and innovative software available to facilitate e-commerce; however, they need to manage global trade with a single, cloud-based, collaborative solution, supported by global trade content, ongoing training and education, and consulting services to ensure a smooth implementation.

Does your company have automated technology solutions that provide the following features essential for frictionless e-commerce?

(Please check all that apply.)



Screening tools to determine if a party to the transaction is on a sanctioned party list, or if goods being shipped are prohibited or restricted in any way



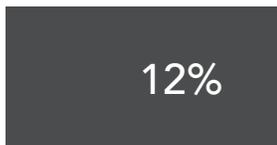
Automation tools to determine if shipments qualify for low-value shipment or calculate and support a deliver duty paid shipment model from shopping carts



System for proper classification of goods based on descriptions from product catalogs and desired country of import



Reliable, real-time order and logistics tracking systems for customers and customer support teams to monitor delivery to the final customer or door location



None of the above



Section 6: Takeaways

As globalization continues to expand and contract, e-commerce will rapidly spread into every retail category. Whether by choice or by force, there are few companies that won't eventually embrace an e-commerce channel.

Regardless of the business model, at the point of order placement there are some specific requirements that e-commerce businesses must have in place to enable frictionless transactions for global trade items. Because these items are coming from another country, they may be subject to duties, tariffs, and other restrictions that domestic items are not subject to. The following are typical checkout notifications, as well as some unique requirements for globally sourced items, that must be in place for a frictionless transaction to properly occur:

- Accurate landed costs to ensure correct pricing for customer quotations
- Product classification for international identification based on HS (Harmonized Tariff Schedule)
- Export and import compliance documentation (chain of custody may be required for some products, particularly where insurance purposes are concerned)
- Duty paid notification before checkout on the site
- Restricted party screening and licensing notifications, if they exist, might need to be resolved prior to order placement (would be provided by the Global Trade Management Solution (GTM) or third party)
- Supplier product information for any special handling or attributes not covered by customs, compliance or regulatory agencies not disclosed in the product description, or specifications on the site (through a supplier enablement process, the product information might be linked to the supplier's site for documentation)
- Certificates of Origin and Certificates of Compliance to provide traceability may be a regulatory requirement for some materials



Appendix A: Survey Demographics

Figure 1: Type of organization

Which of the following categories apply to your company's operations? (Please check all that apply.)



Figure 2: Industry Segment

Please select the industry description that best fits your organization.

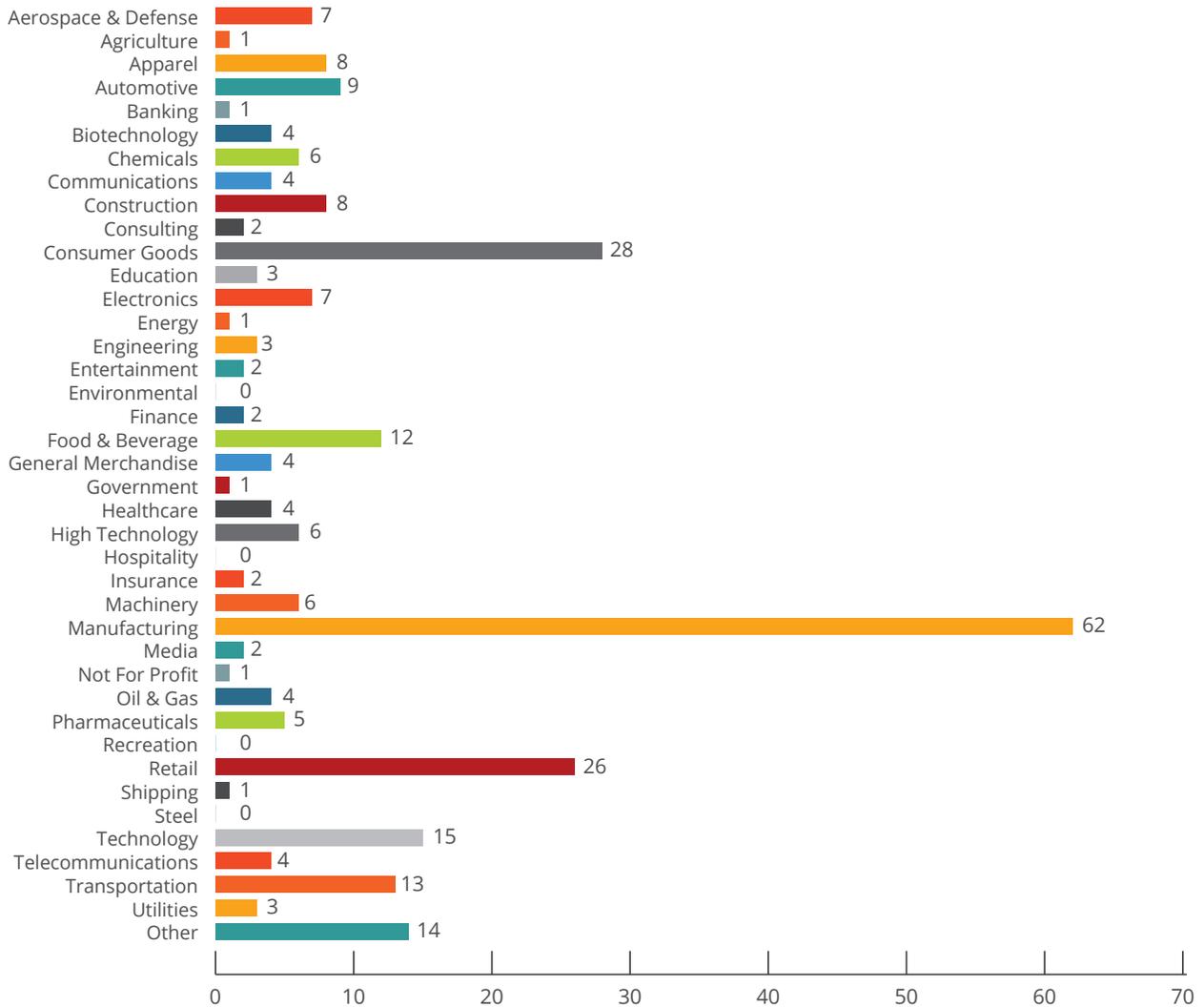


Figure 3: Company Size

What was your organization's annual revenue in the most recent 12-month reporting period?



Figure 4: Annual Shipments

How many shipments (representing sales to customers) does your organization process per year?

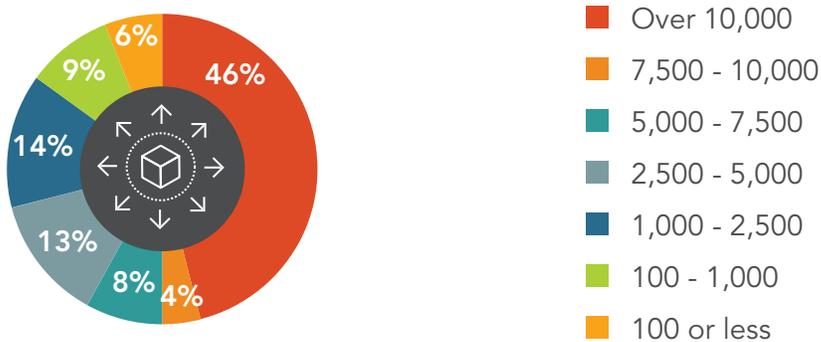
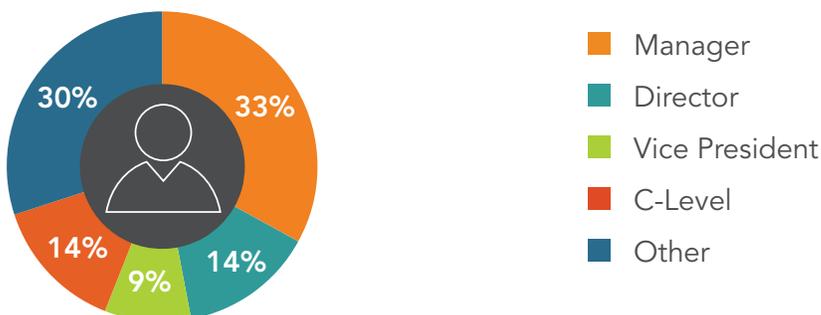


Figure 5: Job Title

What is your position within the organization?



Appendix B: Methodology

Scope of Research

The AAEI/Amber Road e-commerce survey was conducted online. Over 25,000 contacts from multiple databases were invited to participate. The survey was open from December 20, 2016 to January 10, 2017. 281 responses were considered valid and used to create this report.

Target Group

Global trade and supply chain professional primarily in the United States.

Appendix C: About our Sponsors

Amber Road

Amber Road's (NYSE: AMBR) mission is to improve the way companies manage their international supply chains and conduct global trade. As a leading provider of cloud based global trade management (GTM) solutions, we automate the global supply chain across sourcing, logistics, cross border trade, and regulatory compliance activities to dramatically improve operating efficiencies and financial performance. This includes collaborating with suppliers on development, sourcing and quality assurance; executing import and export compliance checks and generating international shipping documentation; booking international carriers and tracking goods as they move around the world; and minimizing the associated duties through preferential trade agreements and foreign trade zones.

Our solution combines enterprise-class software, trade content sourced from government agencies and transportation providers in 147 countries, and a global supply chain network connecting our customers with their trading partners, including suppliers, testing/auditing firms, freight forwarders, customs brokers and transportation carriers. We deliver our GTM solution using a Software-as-a-Service (SaaS) model and leverage a highly flexible technology framework to quickly and efficiently meet our customers' unique requirements around the world.

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, email 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.



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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.

