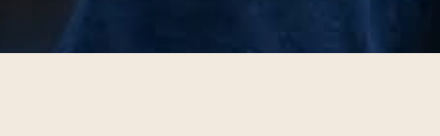
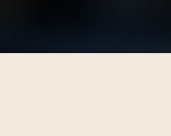


6TH ANNUAL GLOBAL DANGEROUS GOODS CONFIDENCE OUTLOOK

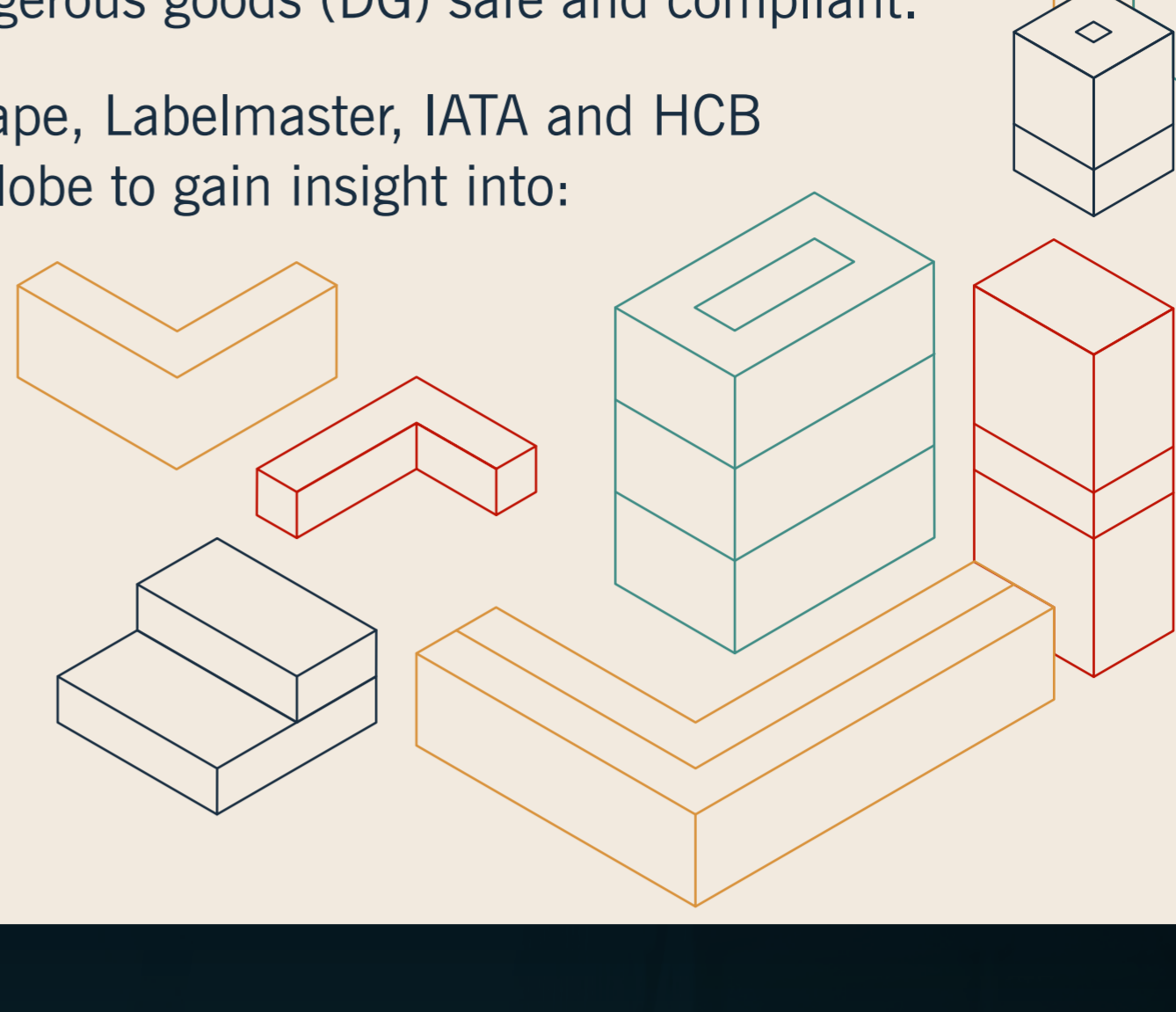
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The past year has put tremendous pressure on the global supply chain. While the industry kept goods moving, several problematic areas came to light, particularly when keeping dangerous goods (DG) safe and compliant.

To better understand the DG landscape, Labelmaster, IATA and HCB surveyed 465 DG pros around the globe to gain insight into:

- » How their organizations managed the pandemic
- » If their DG infrastructure is prepared to meet future needs
- » Changes their DG management operations need moving forward



NORMALCY RETURNING, BUT DG SUPPLY CHAIN GAPS IDENTIFIED

Last year's survey (conducted in June 2020) found organizations struggled with:

Receiving goods in a timely manner

Lack of carrier availability

Training/recertifying employees

Keeping up with compliance rules

Despite that, this year's survey (conducted between March and April 2021) found DG pros feel their organizations managed the pandemic reasonably well and that things are getting back to normal.

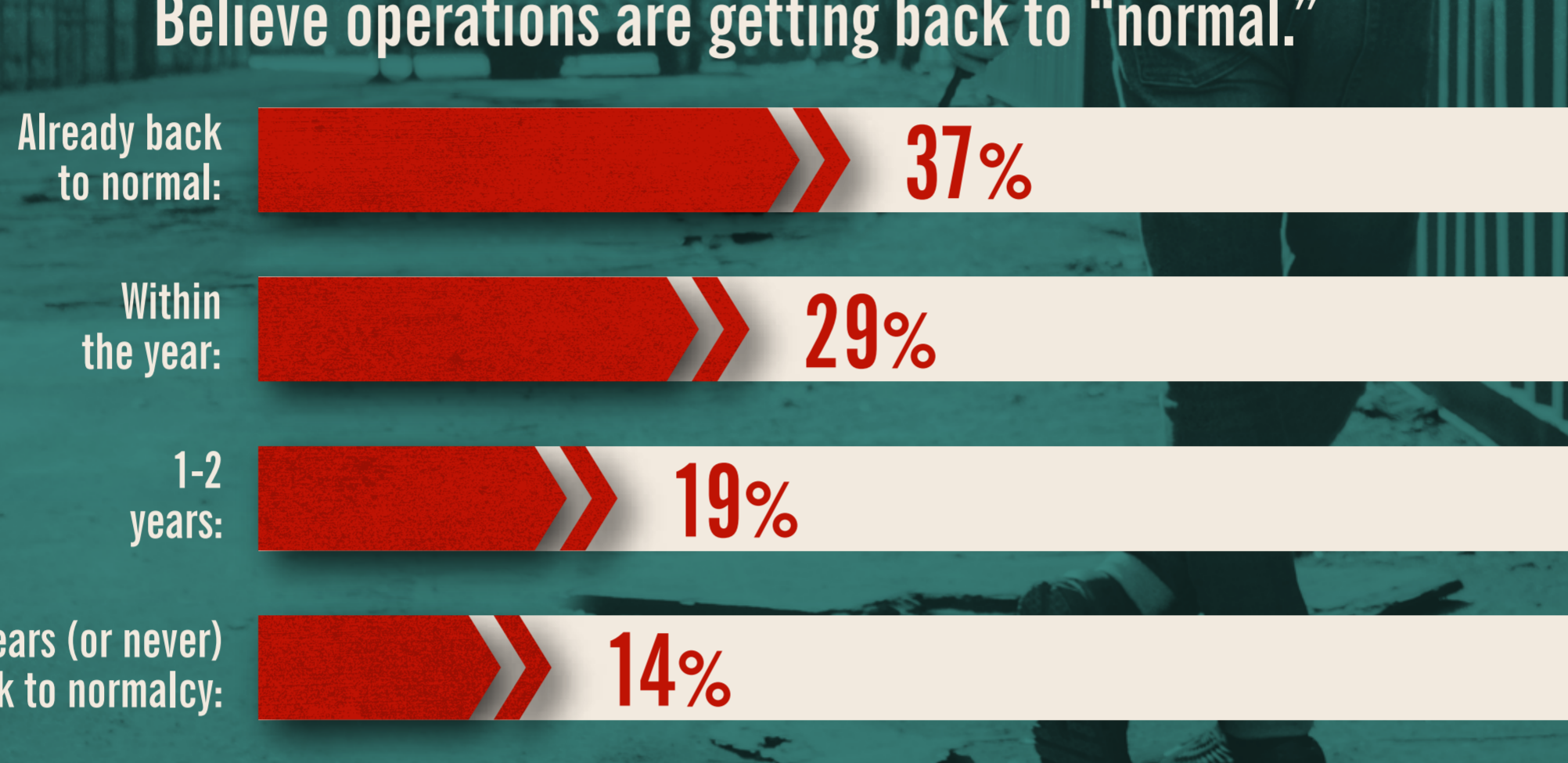


Agree their companies coped well during the pandemic



Agree their supply chain IT capabilities supported DG management well during the pandemic

Believe operations are getting back to "normal."



LOOKING TO THE FUTURE

Despite navigating the pandemic reasonably well, DG pros are signaling that there are still critical organizational issues that must be addressed.

The most critical issues:

Organizational awareness and infrastructure: 50%

Training curriculum and remote learning: 46%

Harmonized regulations and interpretations: 44%

DG technology: 42%

Regulator presence and insight: 37%

Accurate and consistent parts data: 36%



NORTH AMERICA TRAILING EUROPE IN DG COMPLIANCE

Investment to support DG compliance not adequate to meet current needs



Senior leaders are unaware of DG supply chain challenges



View DG regulations and interpretations harmonization as a critical, unmet need



Companies only adhering to the minimum requirement



IN SPITE OF NEEDING BETTER DG RESOURCES, ORGANIZATIONAL SUPPORT IS NOT EXPECTED TO GROW.

Future spending on DG management:

LESS OR THE SAME

MORE



ORGANIZATIONAL PERFORMANCE GAPS

Given these issues, DG pros acknowledge significant performance gaps within their organizations.



INFRASTRUCTURE

Only 25% believe their company's current infrastructure is equipped to meet future needs.

One in 4 companies routinely assess DG parts data for completeness and accuracy.

Less than 20% believe the existing tech at their company supports future DG needs.



COMPLIANCE TRAINING

4 in 10 (41%) feel their current training/recertification curriculum is not equipped to meet future needs.



RULE HARMONIZATION

Only 23% believe regulations are harmonized across region, industry and their organization.

C-SUITE AWARENESS

31% feel their company's senior leaders are not aware of their DG supply chain challenges.

36% of DG pros indicated that their companies only adhere to the minimum requirements.



WHAT NEEDS TO HAPPEN

Though organizations feel positive about how they've managed the pandemic, DG pros still need to:

ENGAGE THE C-SUITE:

Change the conversation from DG being a cost center to a value driver by showcasing operational challenges, cost of compliance vs. noncompliance and revenue and customer service potential.

EVOLVE YOUR DG TRAINING:

Identify how your training must evolve to align with future needs and deliver the greatest value. What is the cost per trained employee? How effective is it? How well do employees retain skills?

MAKE PROCESS CHANGES:

As supply chains become more complex, ensure your organization is operating safely and compliantly. Look at processes and data in your organization and across your supply chain, and adapt for greater transparency and control.

ABOUT THE GLOBAL DANGEROUS GOODS CONFIDENCE OUTLOOK

This survey was conducted online between March 15 and April 30, 2021. All questions were developed by Labelmaster, IATA and HCB. Participant information was not shared with each other or any other outside parties. The data and results are copyrighted by Labelmaster, IATA and HCB.

