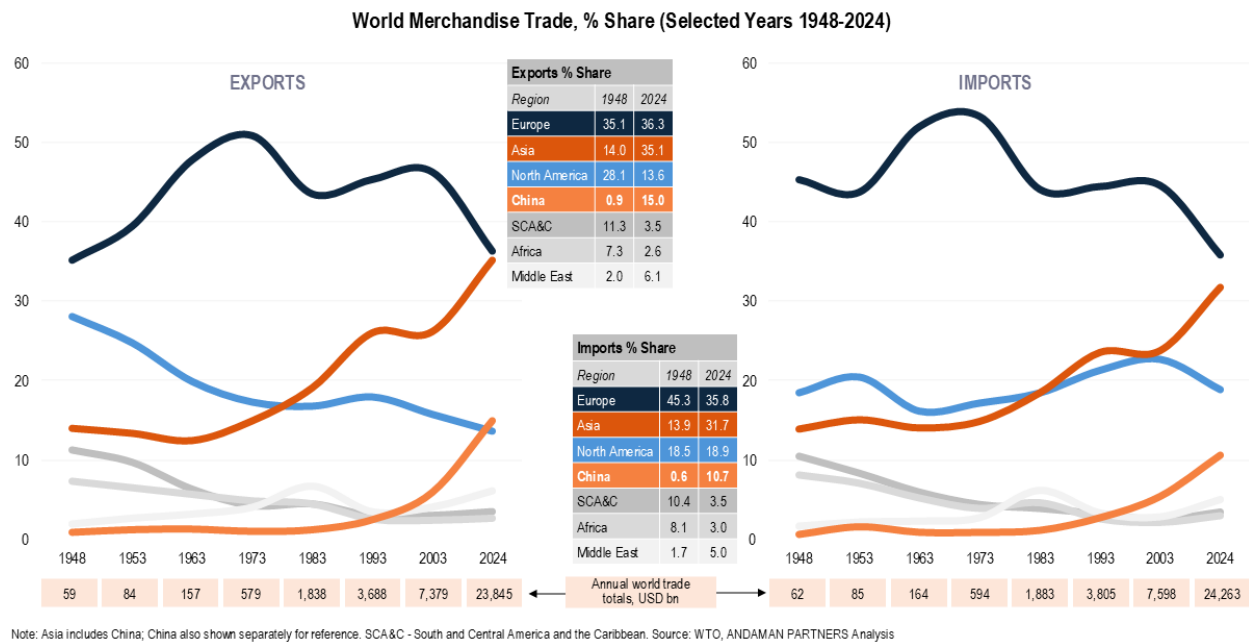


The Long Shift in Global Trade Since 1948 and China's Rise

Since 1948, global merchandise trade has shifted decisively away from the Atlantic economies toward Asia, with China emerging as the single most important country-level driver of that shift.



Since 1948, global merchandise trade has undergone a decisive geographic shift that continues to define the strategic landscape for global companies. The post-World War II system, once dominated by Atlantic economies, has progressively reoriented toward Asia, led by China, reshaping both the supply and demand sides of global trade.

Europe remains the world's largest trading region by share in both exports and imports, underscoring the durability of its industrial base and intra-regional integration. However, its relative position has stabilised rather than expanded. North America's role has become more modest over time, particularly on the export side.

The most significant structural change has been Asia's rise, with the region now accounting for roughly one-third of global merchandise trade. Within that shift, China stands out as the single most important country-level driver, moving from a marginal position in the post-war era to a central role in global trade flows, both as an exporter and an importer.

This long-term reorientation is not a historical footnote; it frames today's strategic reality. Asia-centric trade dynamics increasingly shape growth opportunities, supply-chain resilience, geopolitical exposure and competitive positioning. Understanding this shift is essential for setting strategy in a world where the centre of gravity of global trade has moved decisively eastward.

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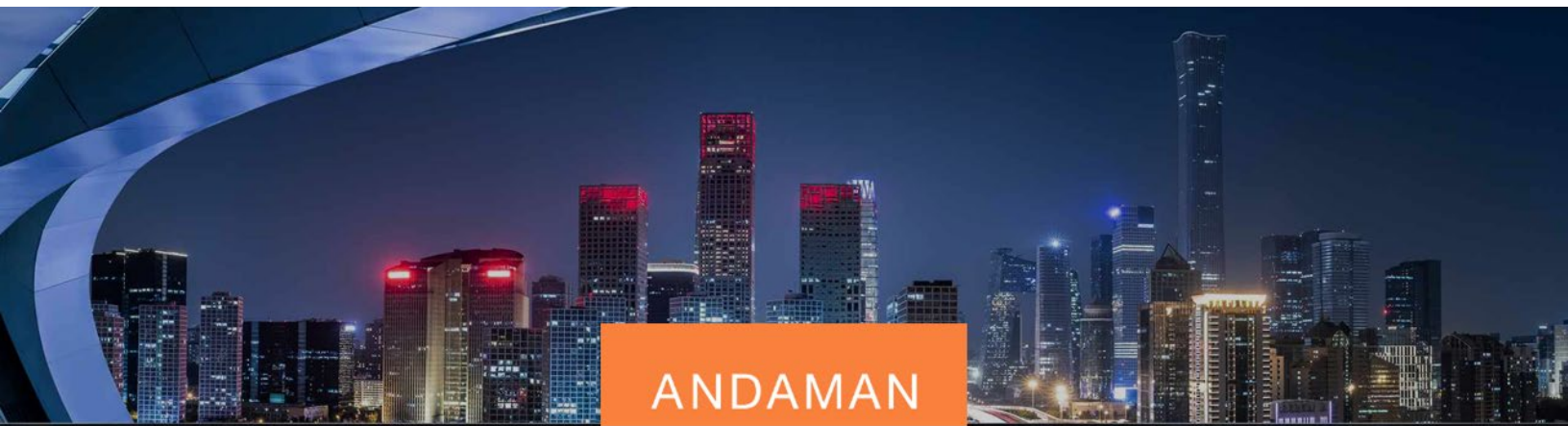
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