Going International 2025

Experiences and perspectives of the German economy in foreign business – results of a company survey

DIHK German Chamber of Commerce and Industry

IHK German Chambers of Commerce and Industry

Contents

Imprint

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The main results

1. The global business outlook for the coming year has improved slightly compared to the previous year. The hoped-for upturn in the global economy is being suppressed by major trade policy uncertainty in North America and structural challenges such as certification requirements and regulations. In view of the trade policy signals from the USA, expectations for business in North America (USA, Canada and Mexico) are collapsing. By contrast, expectations for the rest of the world are brightening - but remain negative on balance.

2. German companies are confronted with more and more trade barriers in their international business. The level of new trade barriers remains very high. 58 per cent of companies have registered an increase in trade barriers in their international business over the past twelve months. Companies are particularly concerned about local certification requirements and stricter security requirements, which increase the planning and cost burden for cross-border trade. Added to this are sanctions, particularly in business with Russia, non-transparent legislation, higher customs duties and local content regulations.

3. The challenges for German companies vary considerably depending on the region of the world. In the USA, half of companies already see new tariffs as a burden - compared to 24 per cent in the previous year. In China, the need for local content in particular is cited as an obstacle (44 per cent). Trade within the eurozone is also hindered by various obstacles, especially bureaucratic ones: 55 per cent of companies criticise legislation that is not transparent for them, 52 per cent report more difficult access to public contracts and 50 per cent see local certification requirements as a problem. Sanctions continue to have a particular impact on business with Russia, where 78 per cent of affected companies feel their influence.

4. Domestic trade barriers from Germany and Europe are becoming increasingly important. 80 per cent of companies report domestic challenges in international business. Of these, 83 per cent complain about bureaucratic hurdles and uncertainty in the implementation of regulations, such as the Supply Chain Sustainability Act (LkSG), the requirements of the Packaging Directive or the EU Carbon Border Adjustment Mechanism (CBAM). 43 per cent have problems in processing their foreign business, for example due to long approval times from the Federal Office of Economics and Export Control (BAFA) or complex customs clearance procedures.

5. German companies are currently benefiting little from the robust growth of the global economy. This is reflected in the global business perspectives. 23 per cent of companies anticipate a deterioration in foreign business in the current year, while only 15 per cent expect an improvement. On balance, internationally active companies do not have positive business expectations for the coming twelve months in any region of the world, although the outlook has improved compared to the previous year. While the business outlook for the current year is largely assessed less pessimistically than before, the current business situation remains poor

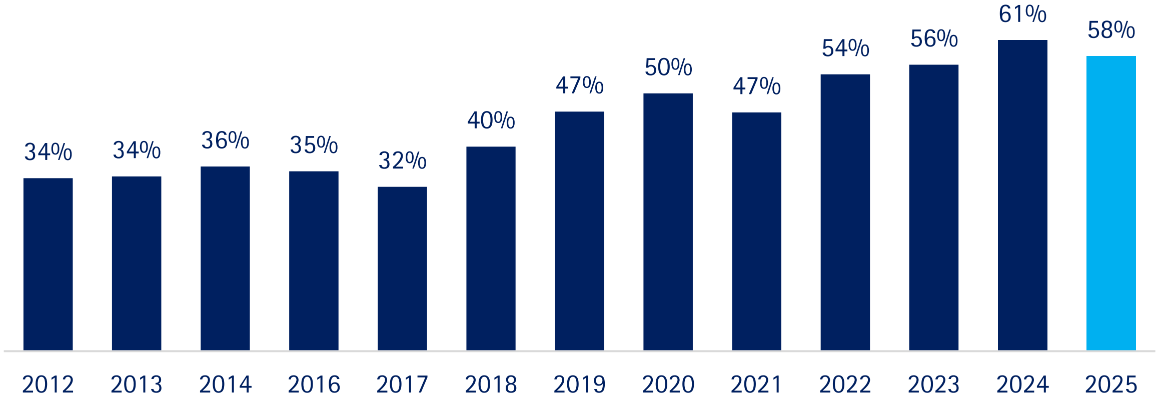
Global trade barriers are increasing

Companies believe that international trade in goods and services is being made more difficult by an increasing number of trade barriers. Well over half of all companies have noticed an increase in trade barriers in their international business in the past year. This continues the dynamic increase in trade barriers. While 32 per cent of companies noticed an increase in 2017, this figure has now almost doubled to 58 per cent. Growing protectionism and great uncertainty regarding the global impact of trade policy decisions as well as stricter certification requirements and new regulations are limiting the development of the global economy and slowing down an upswing in exports in Germany.

Large companies (over 1,000 employees) register an increase in trade barriers in their international business more frequently (69 per cent) than small and medium-sized companies (up to 249 employees), of which 55 per cent state this. Large companies often operate in numerous markets and therefore face different trade barriers in different regions of the world.

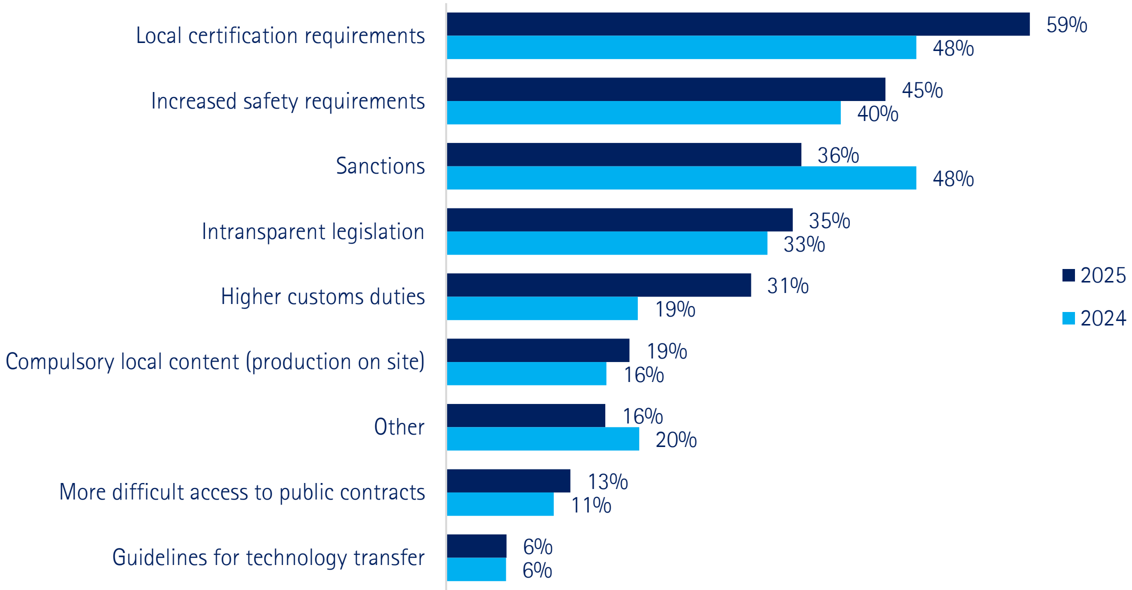
Proportion of companies that have experienced an increase in barriers for their international business

in percent



Increase in trade barriers for international business

in per cent, multiple answers possible, the answers refer to the companies that have felt an increase

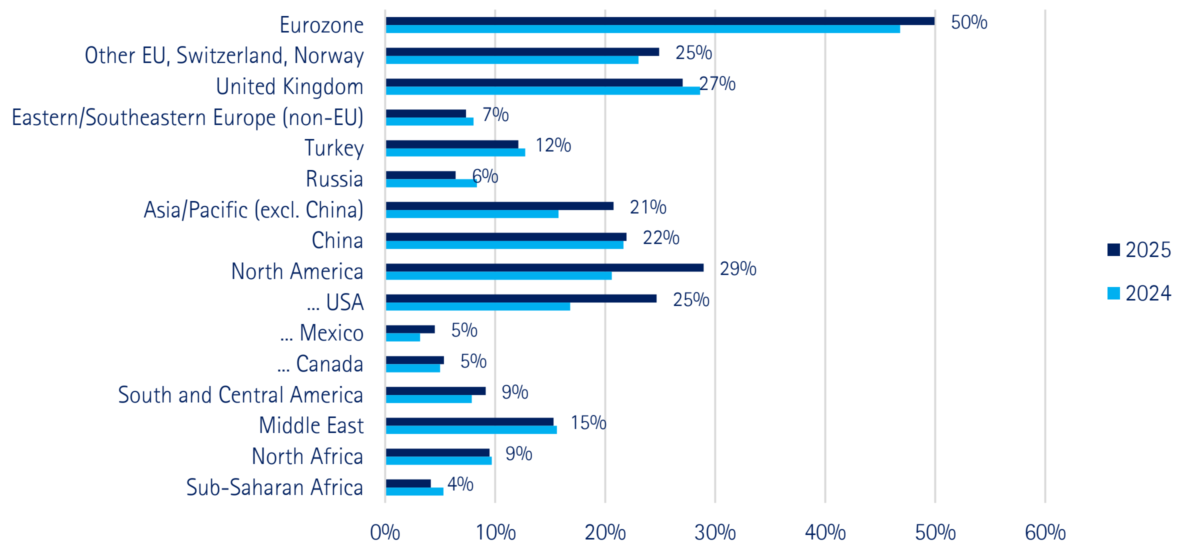


Non-tariff trade barriers in the form of **local certification requirements and stricter security requirements** are making it more difficult for companies to conduct their international business. Almost one in three companies affected by trade barriers (59 per cent, previous survey 48 per cent) have observed an increase in this area. In the eurozone, this affects every second company (50 per cent, up from 47 per cent previously). A significant increase in local certification regulations compared to the previous year is mentioned by companies that do business with the USA (25 per cent compared to 17 per cent previously). This is probably also a consequence of the growing trade conflict between the USA and China, as part of which US authorities are monitoring supply chains even more closely

Increased security requirements are a challenge for 45 per cent of companies (previous survey: 40 per cent). In particular, 49 per cent perceive an increase in security requirements for their business in the eurozone, compared to 38 per cent previously. Product safety requirements - for example for electronic devices, chemicals, food or data protection - often differ between countries or have to be tested and certified separately. Companies have to present certificates before they are allowed to market certain products or services in a country. This results in additional costs and time.

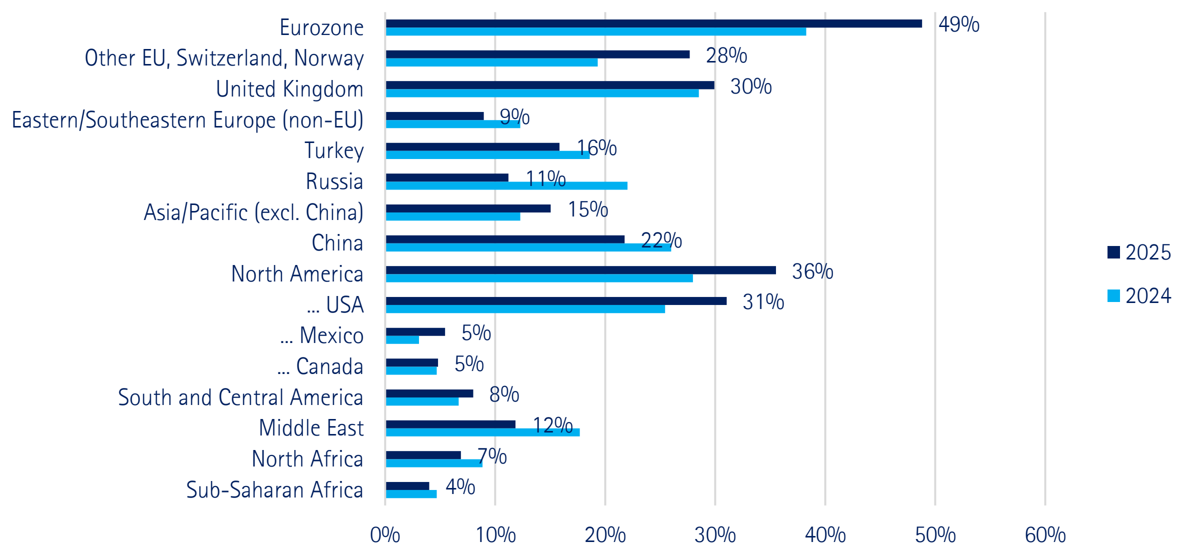
Local certification requirements as a barrier to trade

in per cent, the answers refer to the companies that have felt an increase



Increased security requirements as a barrier to trade

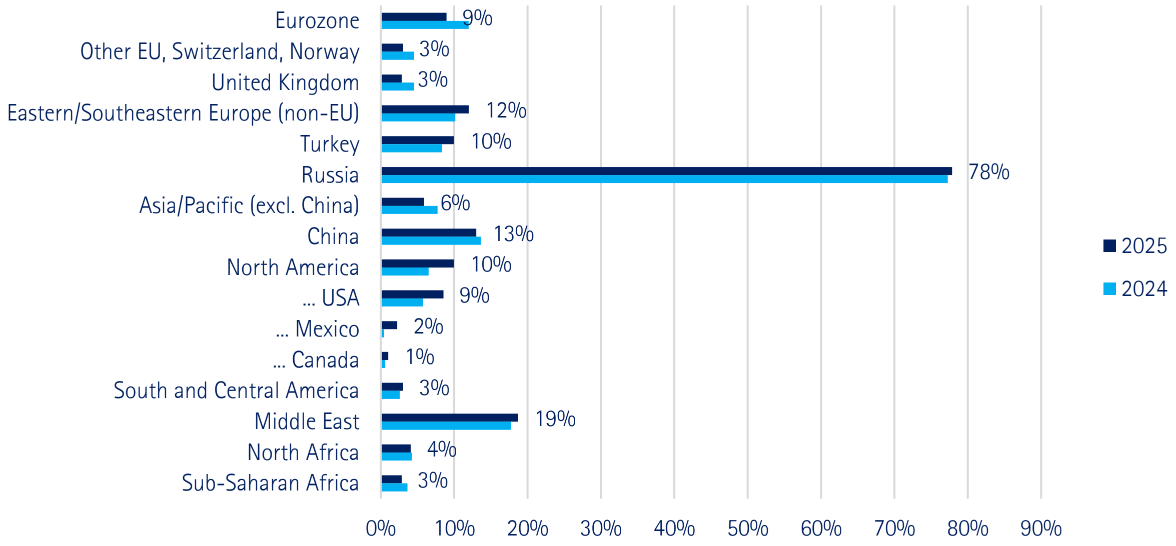
in per cent, the answers refer to the companies that have felt an increase



Another challenge for their international business cited by 36 per cent of companies (down from 48 per cent previously) **is sanctions**, although there is a clear decline here compared to last year. Compliance with sanctions is perceived as a challenge, particularly in business with Russia. At the beginning of 2025, the EU adopted the 16th sanctions package against Russia and at the same time further tightened the measures against Belarus in order to harmonise the two sanctions regimes more closely. The sanctions include additional listings of individuals as well as export and import bans, including restrictions on the import of Russian aluminium. Companies without direct business relations with Russia or Belarus must also continue to scrutinise whether they are affected. If necessary, measures must be taken to fulfil the stricter compliance requirements that have been introduced in response to allegations of sanctions evasion.

Sanctions as a trade barrier

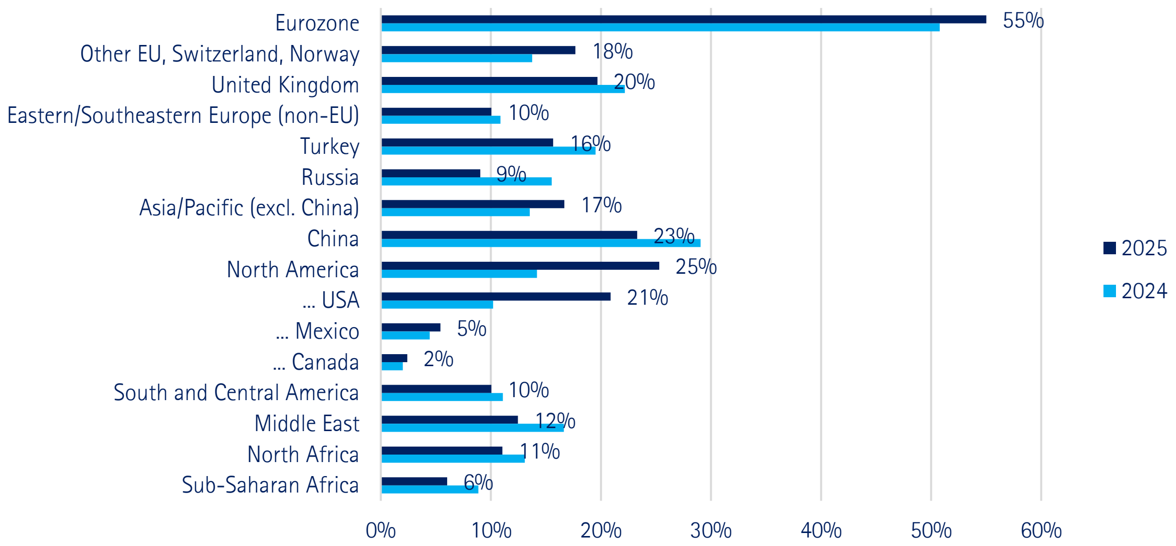
in per cent, the answers refer to the companies that have felt an increase



More than one in three companies (35 per cent, previous survey 33 per cent) complain about **legislation that is not transparent** for their international business. It can be difficult for German companies at their foreign locations to fully comprehend local legislative changes or new regulations. In the eurozone, 55 per cent see themselves affected by this. In North America, a quarter and in the USA in particular, a fifth of companies are affected by non-transparent legislation.

Non-transparent legislation as a barrier to trade

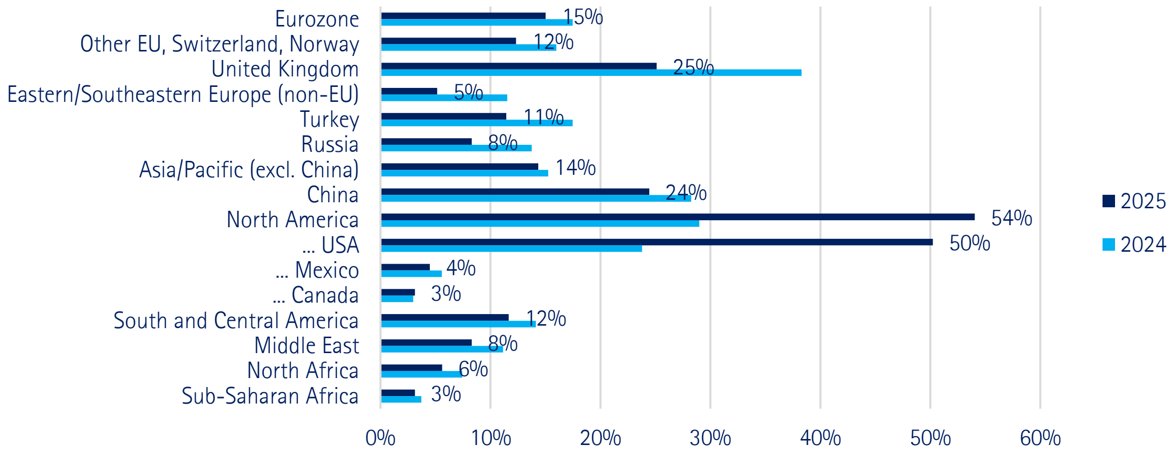
in per cent, the answers refer to the companies that have felt an increase



Around one in three companies (31 per cent, previous survey 19 per cent) are complaining **about higher customs duties** on the export and import of their goods. Companies with US business are particularly affected. Half of the companies already perceive a burden here. In the previous year, the figure was 24 per cent. At the beginning of March, the new US administration imposed tariffs of 25 per cent on imports from Canada and Mexico. However, there is currently a one-month pause for goods imported under the USMCA agreement. Further general tariffs of 25% on steel and aluminium imports - including from Europe - have been in force since mid-March

Higher customs duties Legislation as a trade barrier

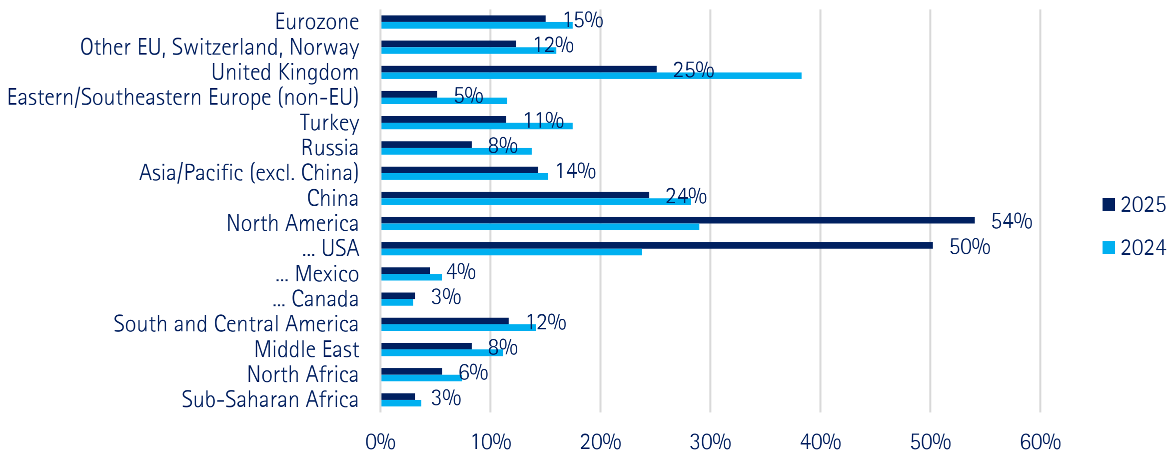
in per cent, the answers refer to the companies that have felt an increase



19 per cent of companies (previous survey: 16 per cent) see an increase in **local content regulations**. This means that companies are forced to generate a fixed proportion of their value added locally - otherwise their goods are subject to customs duties, are excluded from discounts or are excluded from the market altogether. Mechanical engineering companies in particular report these WTO-inconsistent restrictions. The "local for local" strategy, i.e. producing locally for the local market, is being driven forward in the USA in particular by the trade policy of the new US administration. Foreign companies are increasingly being forced to produce locally in order to continue selling their products in the country. This is reported by 35 per cent (previously 34 per cent) of companies operating in the USA. In China, 44 per cent of companies are being forced to use local content, compared to 42 per cent previously, where the localisation of production is being driven forward. This is dampening bilateral trade between Germany and China. Companies in the Asia-Pacific region also state more frequently that they are encountering local content regulations. India, for example, is pursuing an increasing localisation of production locally with its " Make in India" initiative.

Local content as a barrier to trade

in per cent, the answers refer to the companies that have felt an increase



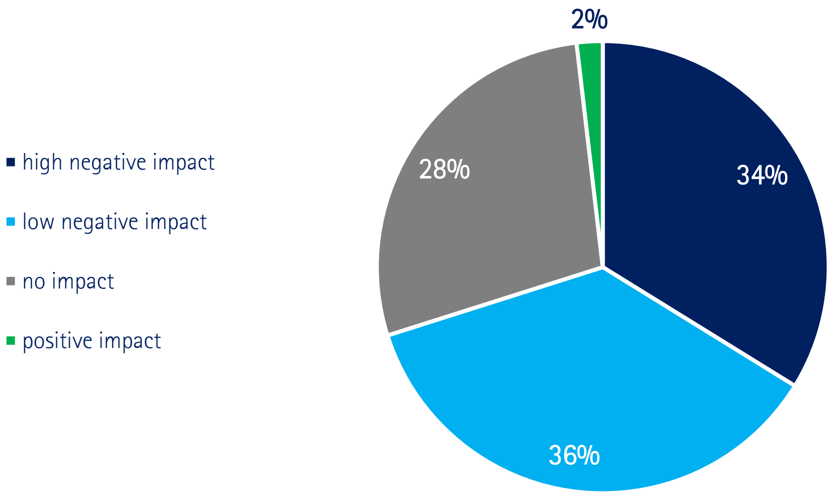
More than one in ten companies (13 per cent, previous survey: 11 per cent) are confronted with more difficult access to public contracts and are therefore at a disadvantage compared to local companies. This slight increase in challenges in accessing public tenders can be seen worldwide. In the eurozone in particular, this is an obstacle for half of the companies (52 per cent compared to 50 per cent previously).

Six per cent - the same number as in the previous survey - are concerned about technology transfer requirements. the eurozone in particular, 36 per cent of companies (up from 26 per cent previously) cite increased technology transfer requirements. For China, on the other hand, fewer companies (34 per cent) than in the previous year (previously 51 per cent) are observing this. Local content regulations, for example, are currently playing a greater role in business with China.

In addition to the response options mentioned, some companies used the free text field to name further barriers to trade. A high level of bureaucracy in the implementation of EU regulations such as CBAM, the Packaging Directive or the EU Deforestation Regulation (EUDR) are often perceived as barriers to trade. Problems in the processing of foreign business, for example due to long processing times at the Federal Office of Economics and Export Control (BAFA) or customs clearance, are also mentioned as a hurdle. The following question on further challenges in international business addresses this in more detail.

Effects of US trade policy are already noticeable

The trade policy of the new US administration is a burden for the German economy. 70 per cent of all internationally active companies expect their business to be adversely affected by the current US trade policy - 34 per cent of them even expect a major impact. This particularly affects companies with US business, but also companies without direct trade with the USA. The burden is particularly evident in the considerable deterioration in current business and the drastic cuts in business expectations for the coming year: While business perspectives in the rest of the world are brightening compared to the previous year, the outlook for US business is becoming noticeably gloomier.



Unlike last year, companies in most regions of the world expect international business to improve over the course of the year. However, when looking at their business on the North American continent, companies are much more negative than in other regions of the world. Although the US economy developed robustly last year, the lack of predictability is having a negative impact on international trade and therefore also on German companies doing business in and with the USA. The tariffs introduced and announced against neighbouring countries, China and other trading partners are causing great uncertainty in terms of trade policy. The mood among companies is therefore rather gloomy for their business in the USA.

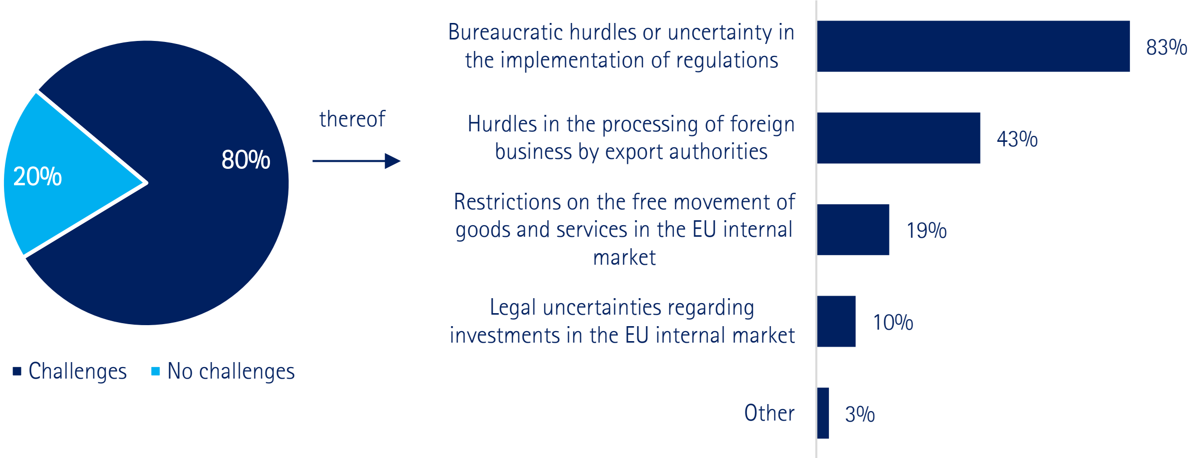
In comparison, a survey by the German American Business Outlook (GABO) shows that despite the optimism among German subsidiaries in the USA, 81 per cent expect their business to be negatively impacted by the proposed tariffs. Of these companies, one in four state that they will be severely affected if the announced tariffs are introduced. Furthermore, 93 per cent report difficulties in finding qualified workers. In addition, visa and immigration issues as well as trade tensions are the biggest concerns for the US businesses of the companies surveyed.

Challenges from Germany and the EU

80 per cent of internationally active German companies are confronted with trade barriers that are based on national or European bureaucracy. Of the companies that face challenges in international business, 83 per cent now complain about bureaucratic hurdles or uncertainty in the implementation of regulations in Germany.

(Further) challenges in international business

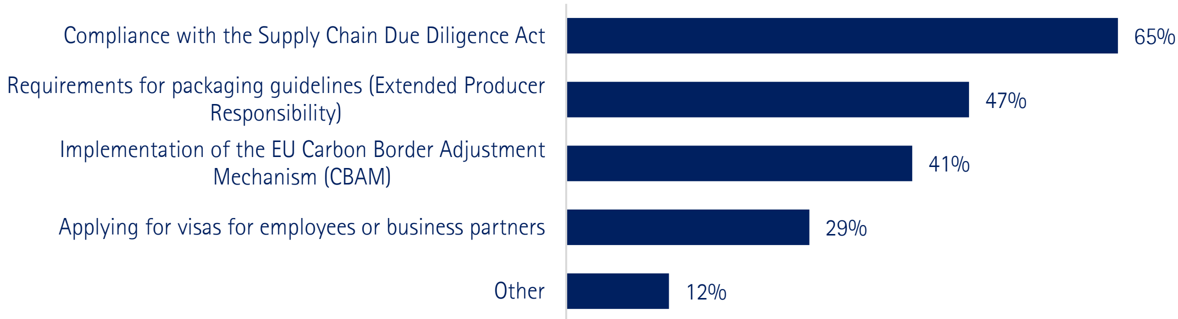
in per cent, multiple answers possible; the percentages in the chart on the right are based on the total number of companies that have challenges (80 per cent)



Home-grown bureaucratic hurdles and uncertainties include compliance with the German Supply Chain Due Diligence Act (LkSG), requirements for EU packaging directives and CBAM implementation. The reporting and due diligence obligations mean, among other things, that companies have to provide more and more information on business partners and suppliers and on sustainability. Almost two thirds of companies see a challenge in fulfilling the requirements of the Supply Chain Due Diligence Act. Large companies with more than 3,000 employees are the most likely (79 per cent) to report difficulties in complying with the LkSG. The fact that small and medium-sized companies are indirectly affected as suppliers also means that almost two thirds (64 per cent) of companies with up to 500 employees see this as a hurdle. As suppliers to large companies, they are often confronted with numerous requests for information. For almost one in two companies (47%), the inconsistent interpretation of the EU Packaging Directive by the member states (e.g. with regard to registration, labelling and authorisation) is a problem - it is perceived as a bureaucratic hurdle.

83% of companies experience bureaucratic challenges in international business, of which:

in per cent, multiple answers possible



Long approval times at the Federal Office of Economics and Export Control (BAFA) cause difficulties for 43 per cent of companies - significantly fewer than last year (57 per cent). The simplifications that have been introduced are noticeable here. Despite the simplifications, however, companies continue to report considerable delays, in some cases over a year, particularly for export licences to China. In some cases, the long waiting times lead to order cancellations and make it difficult to plan international business.

When it comes to international imports and exports, companies also complain about complex customs legislation, opaque customs tariffs and time-consuming and complicated customs clearance procedures, which are often accompanied by changes to customs documents and requirements. Even though companies have access to one of the most modern customs systems in the world the form of the ATLAS electronic customs system, difficulties in handling customs processes are often criticised. In addition, companies with business relationships with Great Britain, for example, very often complain about the lack of exit endorsements at French border customs offices.

Companies also frequently (41 per cent compared to 43 per cent previously) face challenges with the implementation of the EU's Carbon Border Adjustment Mechanism (CBAM). Overall, the responses show that companies have to comply with a large number of regulations and that there is uncertainty as to whether all the necessary documents have been submitted correctly.

Added to this is the time and bureaucracy involved in applying for visas for employees or business partners, which just under a third (29 per cent) of companies mention.

Almost one in five companies (19 per cent, up from 27 per cent previously) are confronted with restrictions on the free movement of goods and services when doing business within the EU single market. This includes, for example, the posting of employees to other EU countries and reporting obligations, as there is no standardised reporting portal. The process takes too long for many companies, especially for short-term postings and service assignments of employees, for example for the installation or maintenance of machines.

Every tenth company (ten per cent after eleven per cent previously) that faces challenges in international business cites legal uncertainties when investing in the EU single market .
The results of the DIHK survey on "Internal market barriers 2024 services, goods and investments" show that legal certainty and the rule of law in the internal market are key location factors for cross-border investments within the EU and therefore also for the free movement of capital in the EU internal market.

Nevertheless, one central aspect of promoting investment and innovation in the EU internal market currently seems to be receiving too little attention: Namely, the need for reliable legal protection for cross-border investments within the EU as a key aspect of promoting innovation. Already over a third of companies in Germany express a loss of confidence in effective legal protection for investments. This is an alarm signal (see EU Justice Scoreboard 2024). Here, companies criticise the termination of the so-called "intra-EU investment protection agreements", and protection mechanisms under international law have also been dismantled. Legal protection for cross-border investments within the EU itself has thus been severely impaired. As a result, trust has been lost. The desire for a successor solution remains.

Some companies also used the free text field to indicate further challenges in international business. High energy prices in Germany and further cost increases are weakening the international competitive position of German companies. Weakening demand from abroad is resulting in few new orders. In addition to home-grown challenges such as bureaucracy and reporting obligations, such as the planned EU Deforestation Regulation (EUDR), the international geopolitical situation, customs regulations and sanctions pose a business risk for international trade

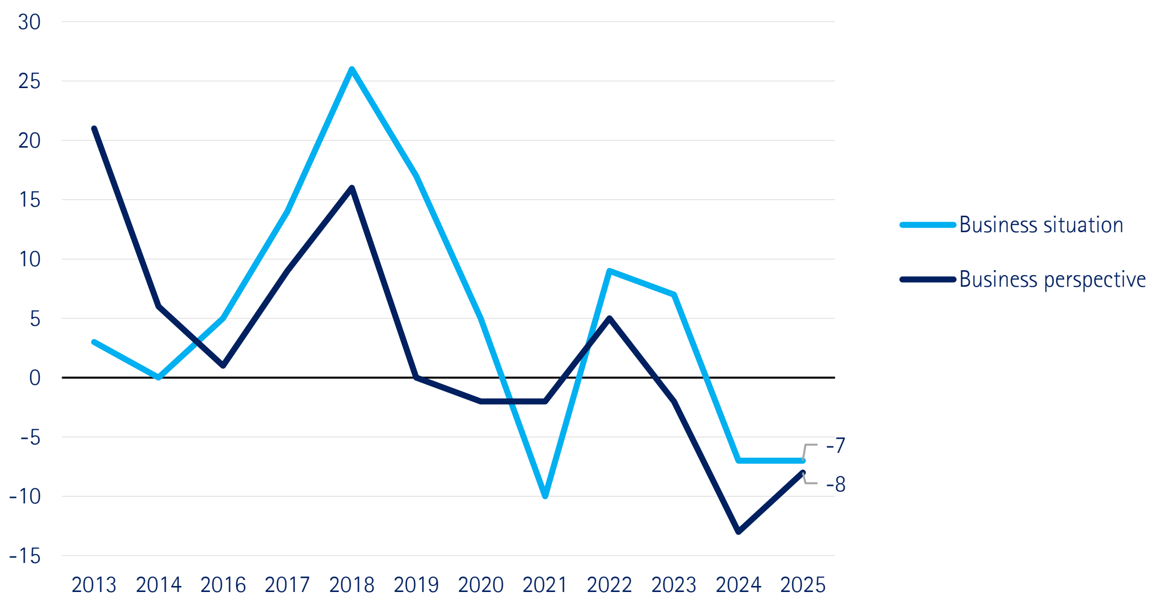
Business situation and perspective in the world regions

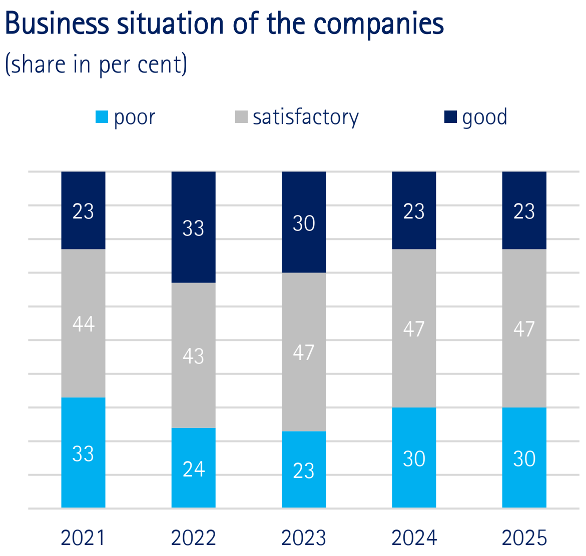
Companies continue to assess their business situation on the international markets as gloomy. The situation remains characterised by many challenges. Increasing trade barriers and geopolitical risks are currently preventing better business. In addition, there are bureaucratic burdens in the processing of foreign business and a high cost burden at the German location, which weakens the international competitive position. The global business outlook for the coming year has improved slightly compared to the previous year. Nevertheless, there are clear differences between North America (USA, Canada and Mexico) and the rest of the world. The hoped-for stronger upturn in the global economy is being suppressed by the major trade policy uncertainty in the USA and its global impact. Overall, 23 per cent of companies rate their international business as good and 47 per cent as satisfactory. Three out of ten companies (30 per cent) report a poor business situation. The balance of good and poor assessments remains unchanged at minus seven points. However, there is a clear difference when looking at the size categories. Large companies with over 1,000 employees are predominantly satisfied with their business situation (balance: four points). Small and medium-sized companies with up to 249 employees, on the other hand, are in a worse position (balance: minus nine points). Large companies tend to be more broadly diversified internationally, meaning that a weaker development in one market is not as significant as for companies that are more focussed on one market.

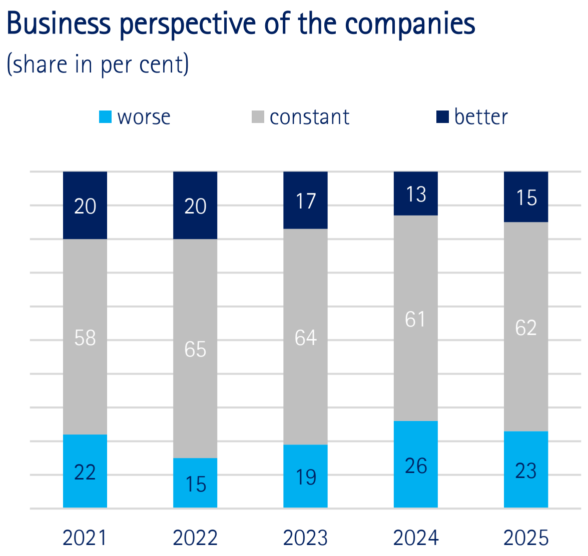
The expectations of internationally active German companies for the development of foreign business in the current year have brightened - but remain negative on balance. Just under a quarter of companies (23 per cent) expect business to deteriorate in the current year, while 15 per cent anticipate an improvement. Almost two thirds of companies (62 per cent) expect their bilateral business relationships to remain stable. The resulting balance of better and worse assessments rises from minus 13 to minus eight points. Large companies with over 1,000 employees (balance minus four points) have a slightly more positive business outlook than small and medium-sized companies with up to 249 employees (balance minus ten points).

Global business situation and business perspective for the German economy

Balance of good/better reports minus bad/worse reports

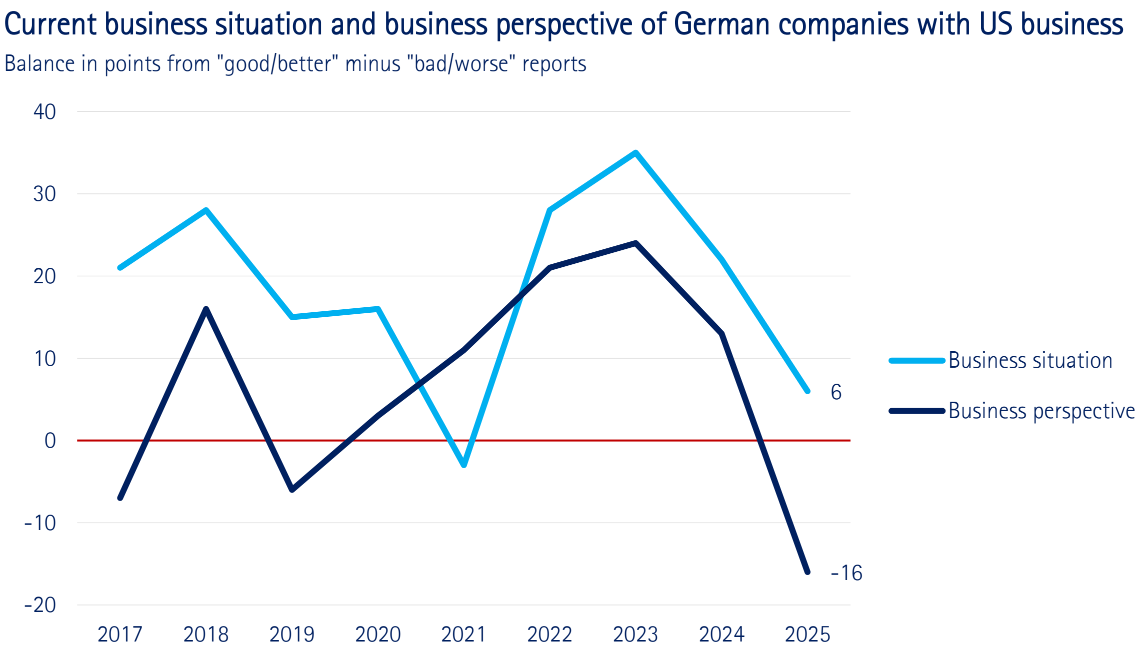






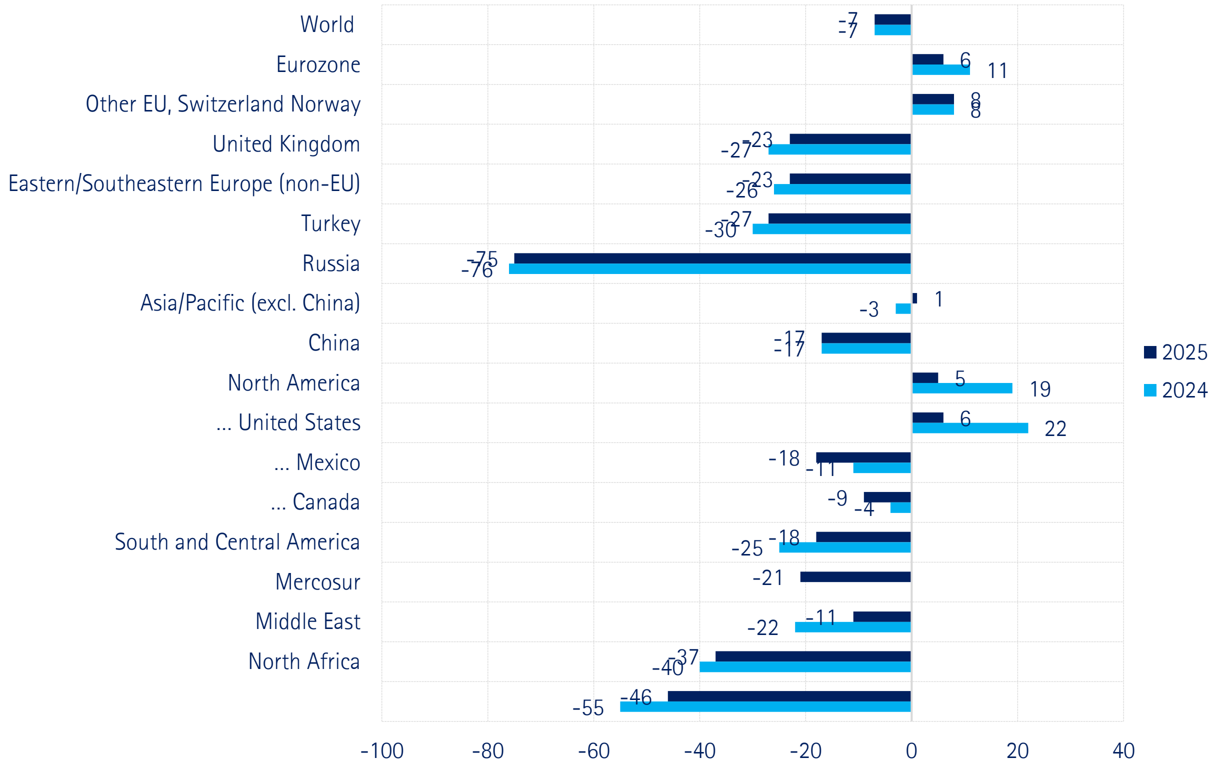
Negative outlook for business in North America

The current business situation has deteriorated significantly across North America compared to the previous year, although the situation for US business is still rated positively on balance. Against the backdrop of major trade policy uncertainty in the USA, 38 per cent of companies there now expect business to deteriorate. Only 22 per cent of companies still expect better business. The balance thus stands at minus 16 points, compared to 13 points previously. The tariffs introduced against neighbouring countries and the threat of a breach of the USMCA agreement, as well as further tariff announcements, have led to a gloomy business outlook. Companies in Canada also expect a predominantly negative development: 21 per cent expect business to deteriorate and only 14 per cent expect it to improve. The balance falls from zero points in the previous survey to minus seven points. Negative expectations also predominate for their business in Mexico, with the balance of better and worse prospects falling from minus six to minus 14 points. Overall, companies assess their business prospects on the North American continent much more negatively than in other regions of the world.



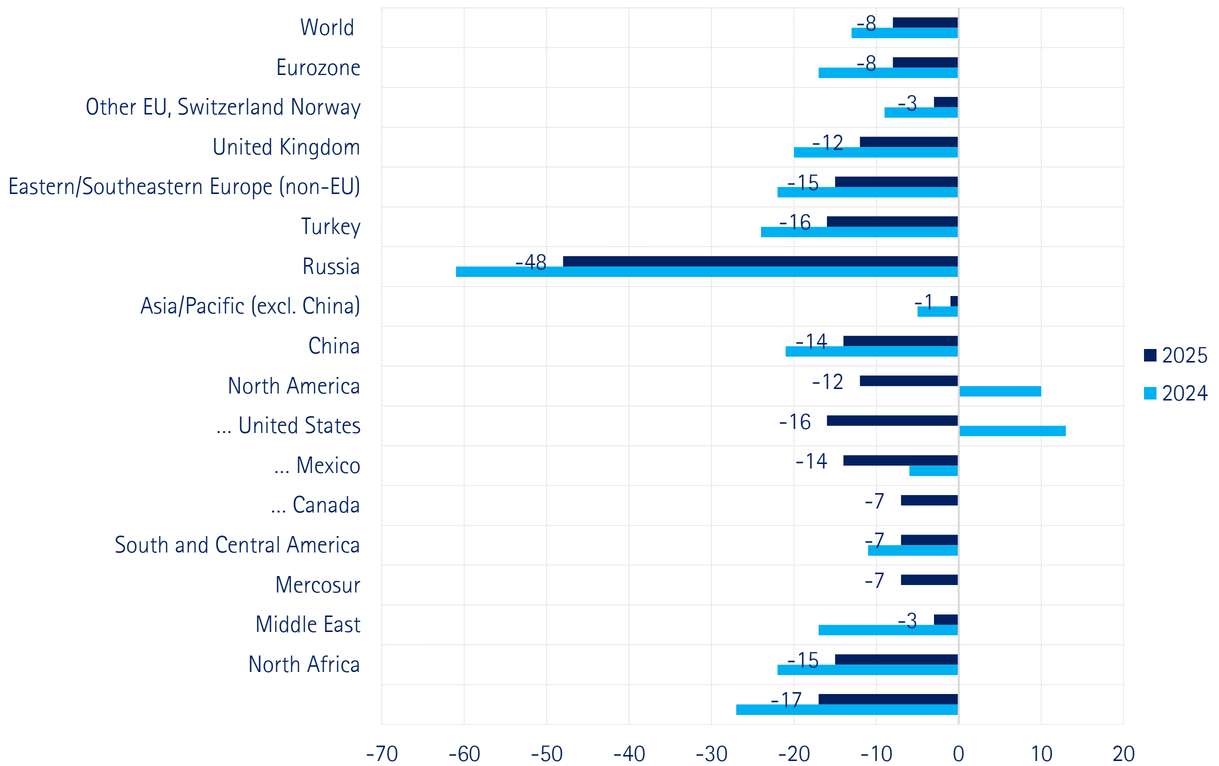
Current business situation in the world regions

Balance in points from "better" minus "worse" reports



Business perspective in the world regions

Balance in points from "better" minus "worse" reports

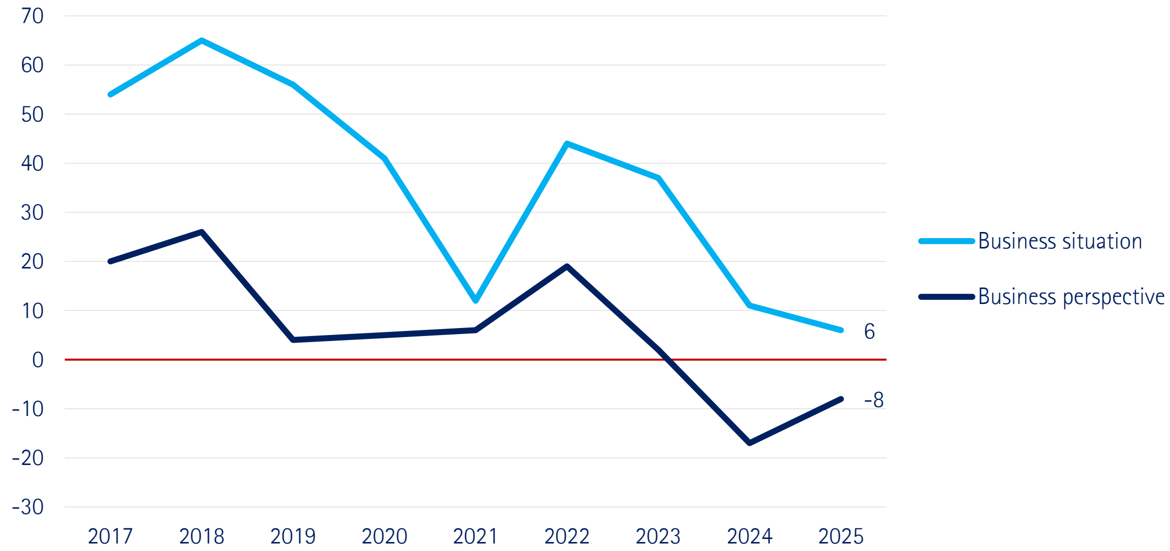


Outlook for business in Europe less pessimistic

German companies with business relationships with neighbouring countries in Europe are currently still reporting a good business situation. In the eurozone, however, the balance has fallen from eleven points to just six points. On the other hand, expectations for the development of business have become significantly more positive than last year. For their business in the eurozone, 15 per cent of companies expect an improvement in 2025, while 23 per cent expect a deterioration (balance of minus eight points after previously minus 17 points). In an international comparison, high energy prices, excessive bureaucratic burdens and regulatory obstacles are slowing down even better economic momentum in the eurozone

Current business situation and business perspective of German companies in the eurozone

Balance in points from "good/better" minus "bad/worse" reports



Companies' business in EU countries outside the single currency area as well as in Switzerland and Norway remains positive at the same level. Companies predominantly rate their current business situation as good (balance of eight points). The business perspective is also brightening. Here, 15 per cent expect an improvement, while just under one in five companies (18 per cent) fear a deterioration (balance minus three points after previously minus nine points).

For business with Eastern and South Eastern European countries (excluding the EU), the proportion of companies with a negative outlook is significantly higher. Although the ratio of optimistic and pessimistic expectations has improved compared to the previous year, it remains pessimistic: while ten per cent expect business to improve, 25 per cent anticipate a deterioration (balance of minus 15 points after previously minus 22 points).

Only ten per cent of companies expect their business with Turkey to improve, while just over a quarter (26 per cent) expect business to deteriorate in the coming months (balance minus 16 points after previously minus 24 points). Although the inflation rate in the country is slowly falling, it remains at a high level and is making imported goods and services more expensive due to the weak currency. Current political developments are also unsettling the economy.

Due to the economic sanctions imposed by the EU and other countries against Russia, their influence is naturally having a particular impact on business with Russia, where 78 per cent of companies are feeling the effects. More than half of the companies (54 per cent) that are still active in non-sanctioned areas expect their business to decline in the coming months.

German-British business relations remain challenging

The business situation in the UK also remains negative, although it has improved slightly compared to the previous year (balance of minus 23 points compared to minus 27 points previously). One in eight companies (twelve per cent) expect their business to improve in the current year, while just under a quarter of companies (24 per cent) expect it to deteriorate (balance minus 12 points compared to minus 20 points previously). Five years after Brexit, German-British business relations therefore remain very challenging.

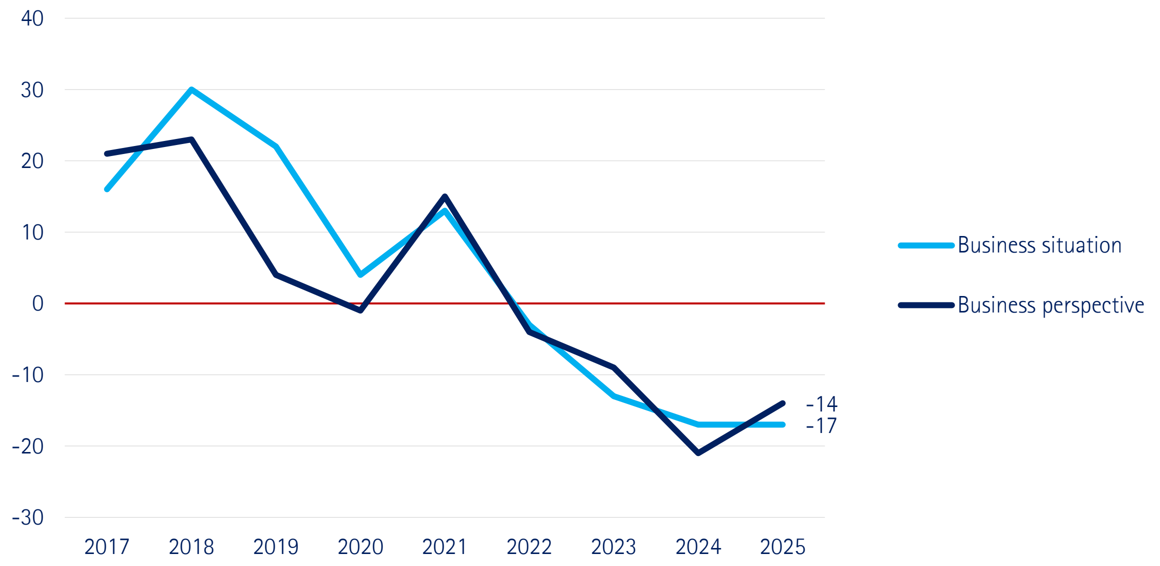
Light and shadow in Asia-Pacific and China

In the assessment of the business perspective for Asia-Pacific (excluding China), positive and negative expectations almost balance each other out. While almost one in five companies (17 per cent) expect business to deteriorate in the current year, 18 per cent anticipate an improvement. The balance improves from minus five to minus one point. The current business situation is also viewed favourably (balance one point after previously minus three points). The region can benefit from the diversification of companies' supply chains.

In contrast, companies are much more pessimistic about their business with China. Although 15 per cent also expect an improvement here in the coming months, almost a third (29 per cent) expect the situation to deteriorate (balance minus 14 after previously minus 21 points). Although expectations are therefore slightly better than the current business situation (balance minus 17 points), the situation remains tense. China's economic weakness and increasing trade barriers, such as localisation requirements, are weighing on bilateral trade.

Current business situation and business perspective of German companies in China

Balance in points from "good/better" minus "bad/worse" reports



Challenging environment in Africa, Middle East and North Africa

Companies' assessments of their future business on the African continent are pessimistic, albeit better than in the previous year. For North Africa, ten per cent expect their business to improve, while 25 per cent expect it to deteriorate (balance minus 15 points after previously minus 22 points). For sub-Saharan Africa, nine per cent also expect an improvement, 26 per cent a deterioration (balance minus 17 points after previously minus 27 points).

Business prospects in the Middle East have improved significantly compared to the previous survey. Positive and negative expectations are now almost in balance. Almost one in five companies (18 per cent) expect business to improve in the current year, while 21 per cent expect it to deteriorate (balance of minus three points compared to minus 17 points previously). However, ongoing conflicts in the region continue to cause uncertainty

Cloudy business situation, but better prospects in South and Central America

Companies in South and Central America see their business perspective as slightly better than the global average. Twelve per cent of companies expect better business, while 19 per cent expect poor business. The balance has improved from minus eleven points in the previous survey to minus seven points. However, future business opportunities are assessed as significantly better than the current business situation (balance minus 18 points), a sign of an upturn.

Business situation and perspective in the world regions

Balance in points from "good" minus "bad" or "better" minus "worse" reports

Mapping the respective balance points of the countries and world regions in a coordinate system consisting of the business situation and business expectations results in a comparison of the regions from the perspective of German companies.

Questionnaire

1. **How do you assess your current business situation in your target regions?**
   (Answer: Good/satisfactory/bad/not active in this region)
   - Eurozone
   - Other EU, Switzerland, Norway
   - United Kingdom
   - Eastern/Southeastern Europe (excluding EU)
   - Turkey
   - Russia
   - Asia/Pacific (excluding China)
   - China
   - North America
     - Of which: USA
     - Of which: Mexico
     - Of which: Canada
   - South and Central America
     - Of which in one or more Mercosur member states (Brazil, Argentina, Uruguay, Paraguay)
   - Middle East
   - North Africa
   - Sub-Saharan Africa

2. **How do you assess the business perspective in your target regions this year (2025)**
   (Answer: Better/staying the same/worse/not active in this region)

   - Eurozone
   - Other EU, Switzerland, Norway
   - United Kingdom
   - Eastern/Southeastern Europe (excluding EU)
   - Turkey
   - Russia
   - Asia/Pacific (excluding China)
   - China
   - North America
     - Of which: USA
     - Of which: Mexico
     - Of which: Canada
   - South and Central America
     - Of which in one or more Mercosur member states (Brazil, Argentina, Uruguay, Paraguay)
   - Middle East
   - North Africa
   - Sub-Saharan Africa

3. **Did you notice an increase in barriers to your international business in 2024**
   (e.g. customs duties, requirements, regulations and laws in the destination country)
   - Yes
   - No

If 3. "Yes"

3.1. **What barriers do you encounter in your international business?** (multiple answers possible)
   - Higher customs duties
   - Increased safety requirements
   - Local certification requirements
   - Compulsion for local content (local production)
   - Technology transfer requirements
   - More difficult access to public contracts
   - Sanctions
   - Non-transparent legislation

- Miscellaneous

If 3.1 "Higher duties" (and for each individual barrier)

3.1.a In which countries/regions was this primarily the case? (multiple answers possible)

- Eurozone
- Other EU, Switzerland, Norway
- United Kingdom
- Eastern/Southeastern Europe (excluding EU)
- Turkey
- Russia
- Asia/Pacific (excluding China)
- China
- North America
  - Of which: USA
  - Of which: Mexico
  - Of which: Canada
- South and Central America
- Middle East
- North Africa
- Sub-Saharan Africa

3.2 What (other) challenges do you face in your international business? (multiple answers possible, except for "no challenges")

- No challenges
- Hurdles in the handling of foreign business by export authorities (e.g. BAFA authorisations, export controls, customs)
  - If yes, which one: Free text
- Bureaucratic hurdles or uncertainty in the implementation of regulations
  - If so, which ones?
    - Compliance with the Supply Chain Due Diligence Act
    - Implementation of the EU's carbon border adjustment mechanism (CBAM)
    - Applying for visas for employees or business partners
    - Requirements for packaging guidelines (Extended Producer Responsibility)
    - Other, namely (free text)
- Restrictions on the free movement of goods and services in the EU internal market (e.g. postings/business trips, reporting obligations within the EU)
  - If yes, which one: Free text
- Legal uncertainties regarding investments in the EU internal market
- Other

4.1 Mercosur: The political negotiations on the EU-Mercosur agreement were concluded in December 2024. The agreement is intended to facilitate mutual market access for both economic blocs. Further procedural steps within the EU are necessary for the agreement to enter into force.

What impact would the agreement have on your company's business activities in the region? (Multiple answers possible)

- Easier market access in Mercosur/fewer trade barriers
- Cost savings due to lower customs duties
- Easier diversification of supply chains
- Expansion or resumption of export activities or sourcing in the region
- Expansion or resumption of investment activities in the region
- No effects
- It would have a negative impact because: (free text)

4.2 Question on the impact of US trade policy:

What effects do you expect for your company's international business if the new US administration introduces tariffs or other trade barriers?

- a major impairment
- a minor impairment
- No effects
- Positive effects

Methodology

The DIHK's nationwide "Going International 2025" survey was conducted with the support of the 79 chambers of industry and commerce (IHKs) in Germany. Almost 2,600 companies based in Germany and active abroad took part in the survey, which ran from 24 February to 7 March 2025.

The company responses are distributed by company size class as follows: 79 per cent of companies with up to 249 employees, eight per cent 250-499 employees, five per cent 500-999 employees, ten per cent more than 1,000 employees.

Of the company responses, 52 per cent are industrial companies, three per cent come from the construction industry, 17 per cent from the retail sector, 14 per cent from the service sector and 13 per cent are other.

The companies operate as follows in their foreign business: 83 per cent export from Germany, 30 per cent have subsidiaries or branches abroad, 31 per cent import to Germany for sale, 18 per cent source abroad for production in Germany, 16 per cent maintain a representative office or sales office abroad, 18 per cent are independent cooperation partners, nine per cent have a joint venture/alliance, eight per cent have research and development, seven per cent are active abroad via e-commerce, four per cent have a transit trade and three per cent have a purchasing office abroad.