

10TH ANNUAL GLOBAL DANGEROUS GOODS CONFIDENCE OUTLOOK

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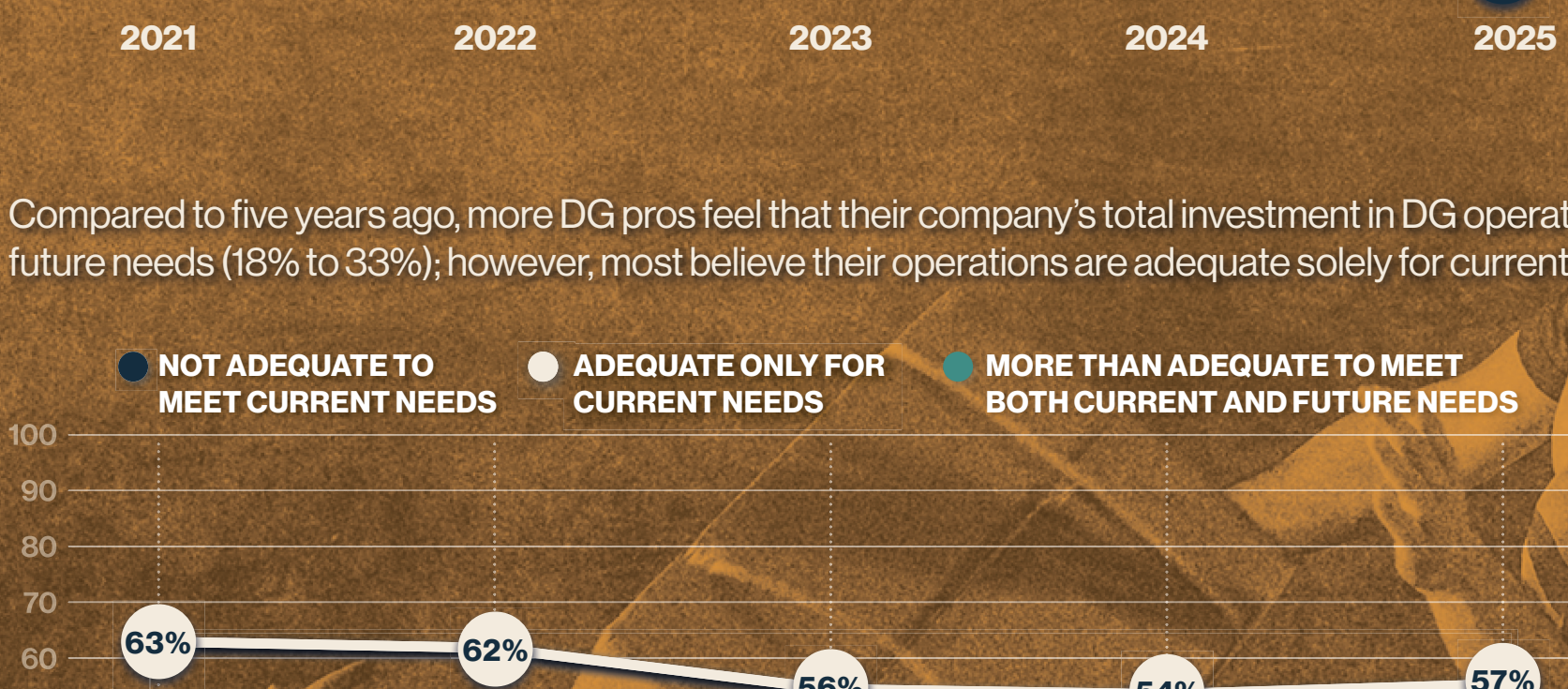
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Innovation in the dangerous goods (DG) supply chain is being driven by evolving business needs, regulations and increased investment.

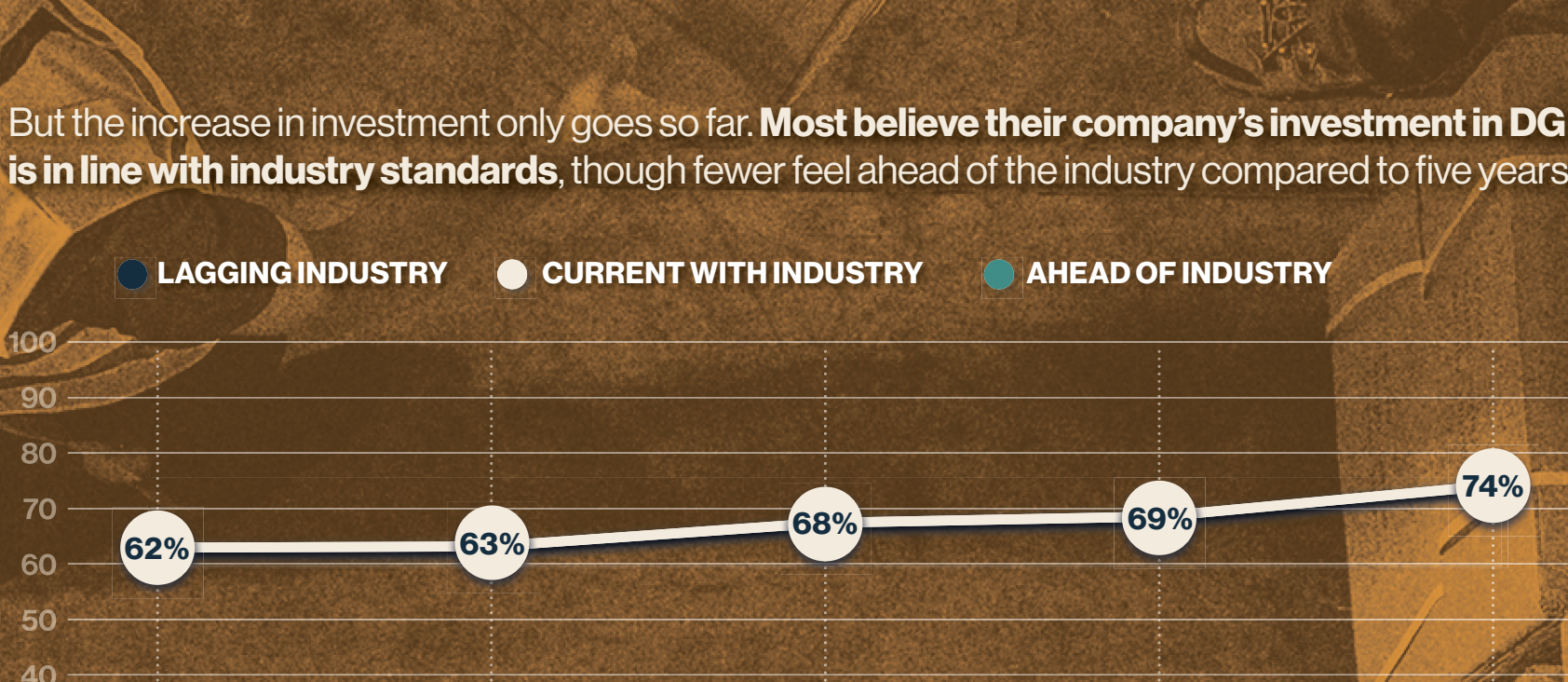
A decade of survey data reveals a clear pattern: An organization's investment in compliance and level of confidence are closely tied to how it perceives and prioritizes DG.

INDUSTRY CONFIDENCE

DG pros are confident in their company's ability to maintain compliant and safe DG operations:



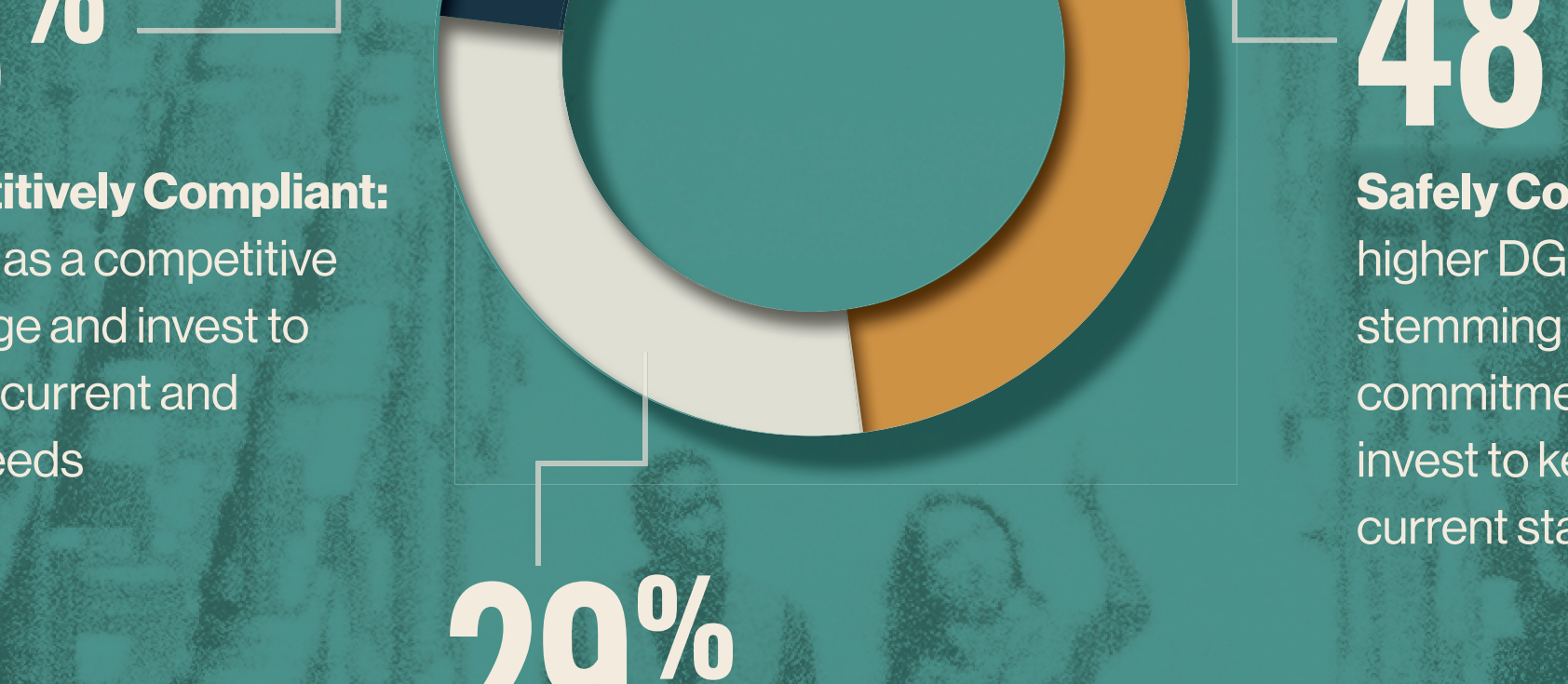
Much of that confidence is based on how much the company invests in DG operations — which has increased over the past five years.



Compared to five years ago, more DG pros feel that their company's total investment in DG operations can meet future needs (18% to 33%); however, most believe their operations are adequate solely for current needs.



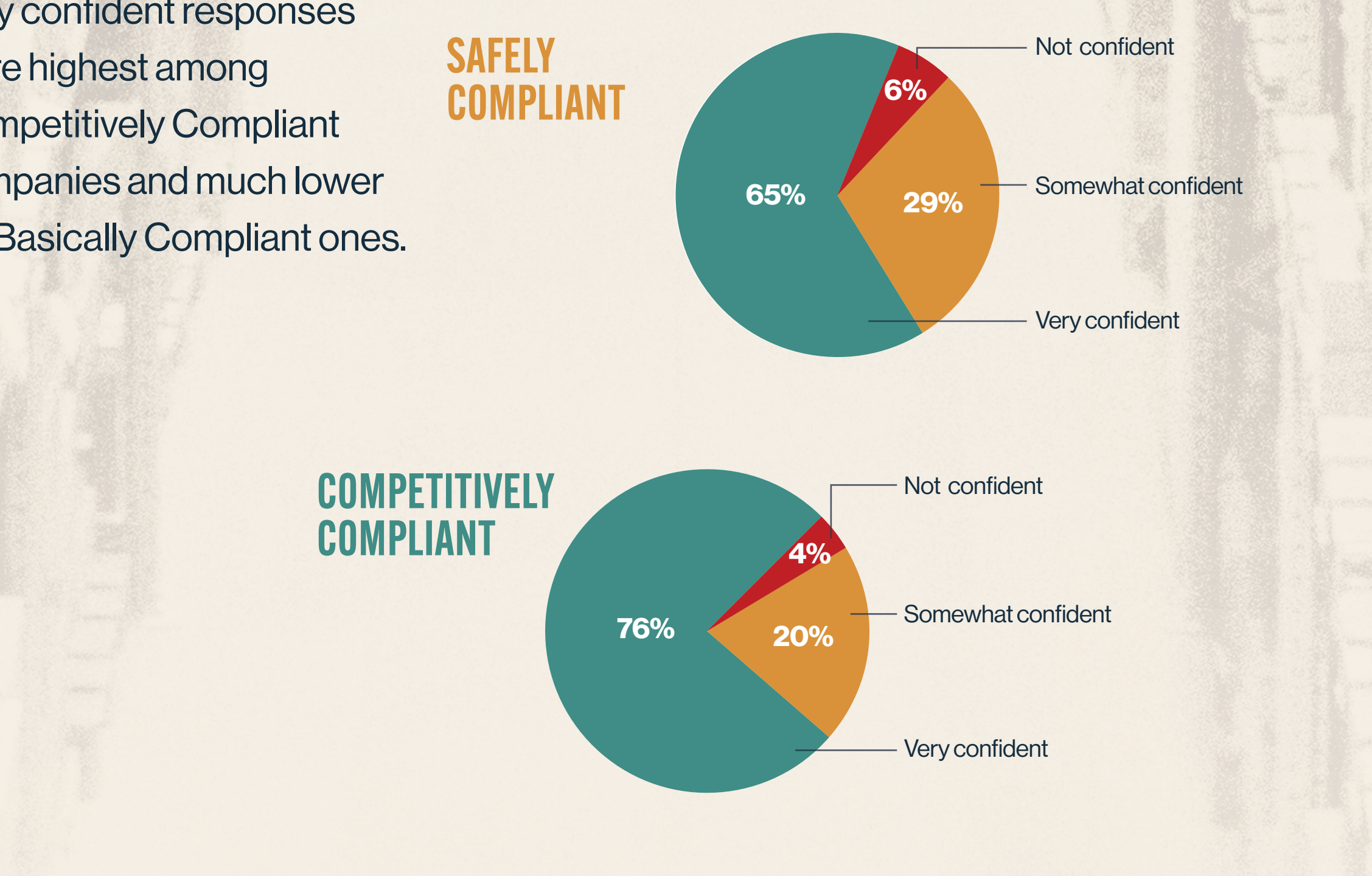
But the increase in investment only goes so far. Most believe their company's investment in DG operations is in line with industry standards, though fewer feel ahead of the industry compared to five years ago.



WHAT DRIVES DG CONFIDENCE?

Confidence is often tied to how companies support, fund and integrate DG compliance into broader operations.

COMPANIES GENERALLY FALL INTO THREE CATEGORIES:



Competitively Compliant: view DG as a competitive advantage and invest to address current and future needs

Basically Compliant: do the minimum required by regulatory mandates often resulting in limited resource investment

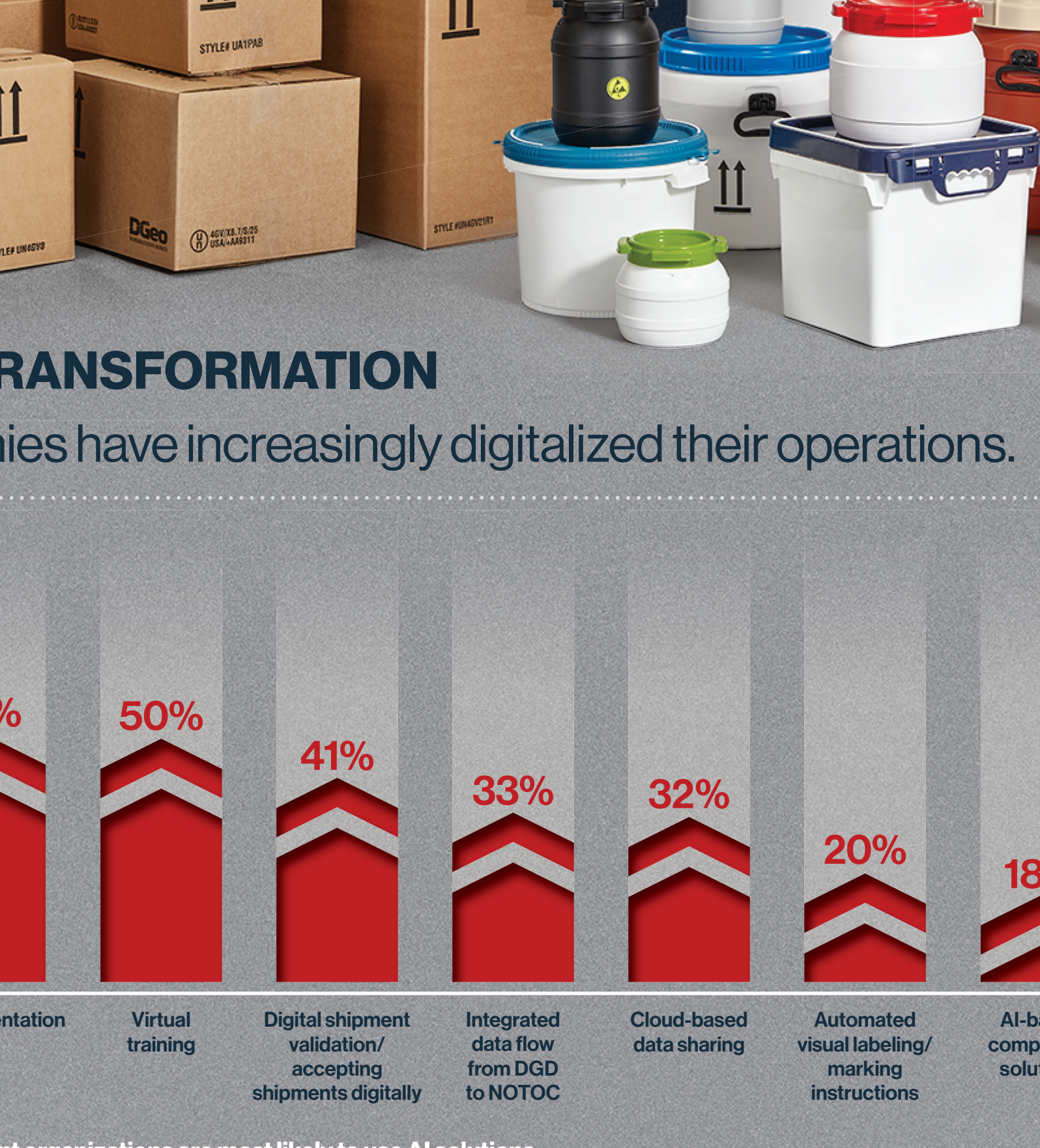
Safely Compliant: achieve higher DG confidence stemming from an overall commitment to safety and invest to keep pace with current standards

Confidence in a company's own processes, training and detection is different, depending on the segments.

Very confident responses were highest among Competitively Compliant companies and much lower for Basically Compliant ones.



And overall, the confidence in supply chain partners is lacking — compared to how DG pros perceive their own operations.

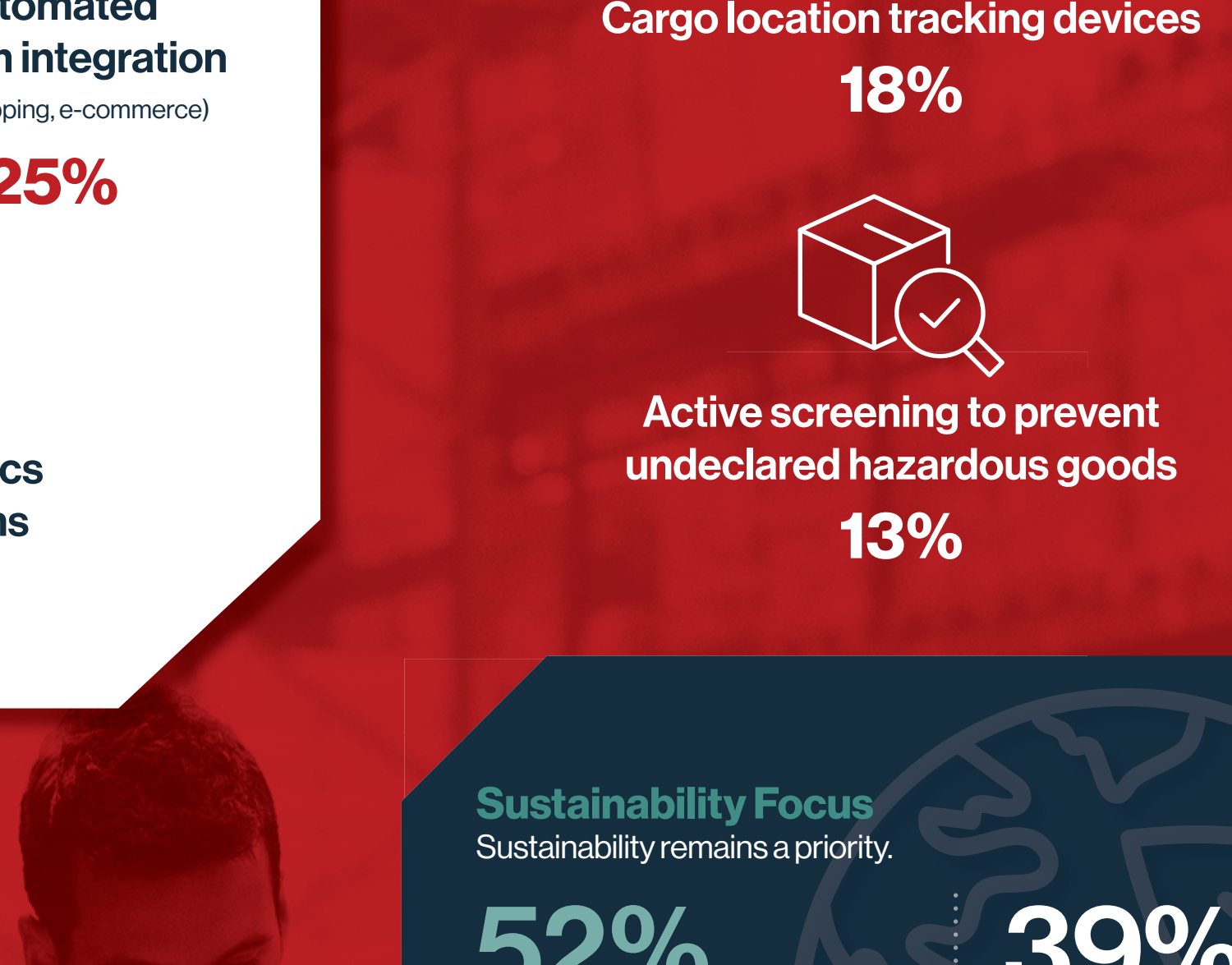


HOW DG COMPANIES ARE INNOVATING

SMARTER PACKAGING

60% will invest in it within the next two years — 26% call it a major focus.

The key? Partnering with a high-quality DG packaging supplier who offers:



The need: 57% of respondents reported that packaging issues (leaks, damaged containers and failed certifications) negatively impacted their organization's costs or reputation; 21% reported a moderate to severe impact.

Outside Forces Driving Change

Emerging policies and market forces that are reshaping DG packaging strategies over the next five years:



DIGITAL TRANSFORMATION

DG companies have increasingly digitalized their operations.



Competitively Compliant organizations are most likely to use AI solutions.

Software Automation

Types of software automation used to manage DG:

DG shipping tools (templates, e-docs)

53%

DG handled manually

27%

Automated DG expertise (e.g., regulation validation, master data)

26%

Automated system integration (ERP, shipping, e-commerce)

25%

Integrated with robotics and conveyor systems

5%

Smart Monitoring Emerging in DG Operations

Almost half (43%) use digital traceability or smart sensor technology to monitor DG in transit.

Of those that are, the top three were:

Real-time cargo monitoring via cameras

21%

Cargo location tracking devices

18%

Active screening to prevent undeclared hazardous goods

13%

INNOVATION DRIVING TRANSFORMATION

Top innovations DG pros are excited about over the next five years:



RAISING THE BAR IN DG OPERATIONS

While most are confident in meeting today's DG needs, that confidence drops when looking to the future. As supply chains become more complex and expectations rise, DG operations must evolve.

The data shows that companies treating DG management as a business priority — and investing accordingly — gain operational and financial advantages. Those doing only the legal minimum risk falling behind.

Top-performing companies stand out in two key areas:

Data quality and shipping management

Improved consistency and compliance

Less reliance on tribal knowledge or guesswork

Automate processes across product types and locations

Optimize cost by shipping mode

Deliver faster with fewer manual touchpoints

Tools to help: DGIS IATA DG AutoCheck

Modern packaging

Spend smarter: Slimmer, lightweight materials cut costs and save space

Simplified compliance: Modern designs reduce labels and training requirements

Smarter materials: Advanced tech enables more rigorous testing

Sustainability made easy: Eco-friendly choices offer real ROI

Less hassle: Less packaging means faster shipping and lower labor costs

About the Global Dangerous Goods Confidence Outlook

This survey was conducted online between May 28 and July 21, 2025. All questions were developed by Labelmaster, DGeo, IATA and CurTec. Participant information was not shared with each other or any outside parties. The data and results are copyrighted by Labelmaster, DGeo, IATA and CurTec.

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