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Supply Chain Resilience Report

British Chamber of Commerce South China
Supply Chain Working Group

Contents

Foreword

In early December 2025, the British Chamber of Commerce South China brought together business leaders, logistics professionals, manufacturers, and policy specialists across Shenzhen, Guangzhou, and Shanghai for Supply Chain Resilience Week. The programme included site visits, roundtable discussions, and structured conversations about the pressures facing global supply chains.

What we heard was frank, detailed, and often sobering. The businesses taking part are not dealing with a temporary disruption. They are navigating a fundamental shift in how global trade works, driven by overlapping geopolitical pressures, unpredictable policy, and the challenge of building resilience when margins are tight and planning horizons have shortened from years to weeks.

On 10 March 2026, the programme continued with a dedicated Net Zero Conference in Guangzhou, where 25 delegates explored how supply chain decarbonisation connects with resilience. The findings from that event are woven throughout this report.

Throughout the programme, we were joined by senior experts from the UK including representatives from the Foreign, Commonwealth and Development Office (FCDO) and the Department for Business and Trade (DBT), whose participation shaped the questions we asked and the conclusions we drew. Their engagement ensured that the findings in this report reflect not only the operational realities on the ground in South China, but the policy questions that matter most to UK government and business back home.

One broader framing emerged consistently across the discussions: that the word "chain" no longer captures the reality of how global trade works. What businesses are actually managing is a supply web – a dense, multi-directional network of interdependencies where a disruption at any node ripples outward in ways that are rarely obvious until the effect lands somewhere unexpected. That shift in mental model has practical implications for how resilience is built and how policy should respond.

Participants included senior representatives from Autoliv, KPMG, Royale International, CIPS, Knight Frank, CEIBS, Sound United, Charles Kendall Freight, Woodland Logistics, Smiths Group, VOION, Lakeshore, Cathay Pacific, BSI, China 2 West (C2W), Kinyu, and Nespresso/Re:cycle, among others. Their willingness to share real operational detail, not just headline positions, is what gives this report its weight.

The report draws on qualitative evidence from three roundtables, facility visits to Yantian port, MagLab, and the Dongguan Innovation Research Institution, a parallel survey of 50 firms with direct exposure to China-linked supply chains, and the Net Zero Conference proceedings. The findings are intended to inform UK government policy and to give a voice to the businesses doing the hard work of keeping trade moving.

We are grateful to the FCDO, DBT, the British Chambers of Commerce in the UK, BritCham Shanghai, and every participant who gave their time and candour.

Mark Clayton
Chair, British Chamber of Commerce South China

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Executive Committee Member, British Chamber of Commerce South China

Executive Summary

This report draws on a survey of 50 firms with direct exposure to China-linked supply chains, three roundtable discussions with over 60 supply chain leaders across Shenzhen, Guangzhou, and Shanghai, facility visits, and an additional Net Zero Conference in Guangzhou.

The central finding is straightforward: decoupling from China is not happening, but the terms of engagement are changing fast.

1. China's position is structural, not habitual.

56% primarily rely on China. 58% source at least half their inputs there. 83% plan to maintain or expand over the next three years. Zero plan to exit. The reason is ecosystem completeness: dense supplier networks, rapid tooling, integrated logistics, and production scalability that no alternative market replicates. Where diversification to Southeast Asia has been attempted, firms report costs 10–15% higher and continued dependency on Chinese raw materials upstream. The pattern is hedging, not departure.

2. The damage comes from unpredictability, not from tariffs themselves.

Geopolitical tensions (52%) and tariffs (50%) are the top disruption sources. But businesses can absorb a known cost. What paralyses decision-making is not knowing whether that cost will exist next quarter. 46% cite policy uncertainty as the single biggest barrier to resilience.

3. Most firms are watching, not acting.

The most common response is increased monitoring (32%). 24% have made no adjustments at all. Firms that are adapting are building optionality: the capacity to switch suppliers, routes or configurations quickly. But this requires upfront investment that most SMEs cannot afford. Finance is the clearest dividing line. Trade finance instruments remain geared toward exports, not the import-side restructuring that resilience demands.

4. Net zero and resilience are often the same operational problem.

For global supply chain firms, roughly 85% of carbon emissions sit in Scope 3. The EU's CBAM, and CSRD are creating near-term forcing functions, and no Chinese company has yet certified through BSI's net zero pathway standard. Case studies showed that substantial emissions reductions came from operational changes (relocating distribution, switching freight modes) rather than technology investment. Green technology and green finance were independently cited by multiple respondents as the single biggest opportunity in UK-China trade.

5. What businesses want from government is practical, not strategic.

The top need is networking with partners (38%), followed by better market and policy intelligence (23%). Businesses are not asking for grand strategy. They want introductions, timely information on regulatory changes, and help navigating complexity. Government should be more present on the ground, working with local business groups in both China and the UK to foster the networking and collaboration that firms say they need most.

The overall picture: The question for most firms is not whether to remain in China but how to manage the risks of doing so. Policy should support managed interdependence, not accelerate a decoupling that businesses are not pursuing and that the evidence does not support.

> **"The instinct when people talk about tariffs is to focus on the number, 10%, 25%, 145%. But the rate is almost secondary to the predictability."**
>
> Supply Chain Company
> Shenzhen Roundtable

Geopolitics & Uncertainty Are Disrupting Half of All Businesses

When asked what keeps them up at night, businesses gave the same answer at every session: uncertainty.

Overlapping shocks are interacting and amplifying each other along value chains: tariff escalation, regulatory divergence, geopolitical risk, logistics disruptions and abrupt policy shifts.

The survey data confirm the picture. Geopolitical tensions and policy uncertainty are the most-cited source of disruption at 52%, narrowly ahead of tariffs and trade restrictions at 50%. Logistics delays and costs affect 34%. Together, these three interconnected factors account for the vast majority of disruption reported.

The key finding, supported by both the survey and every roundtable session, is that it is not the level of tariffs that does the most damage. It is their unpredictability. Businesses can price in a known cost. They cannot plan around one that might not exist next quarter.

Sources of Supply Chain Disruption

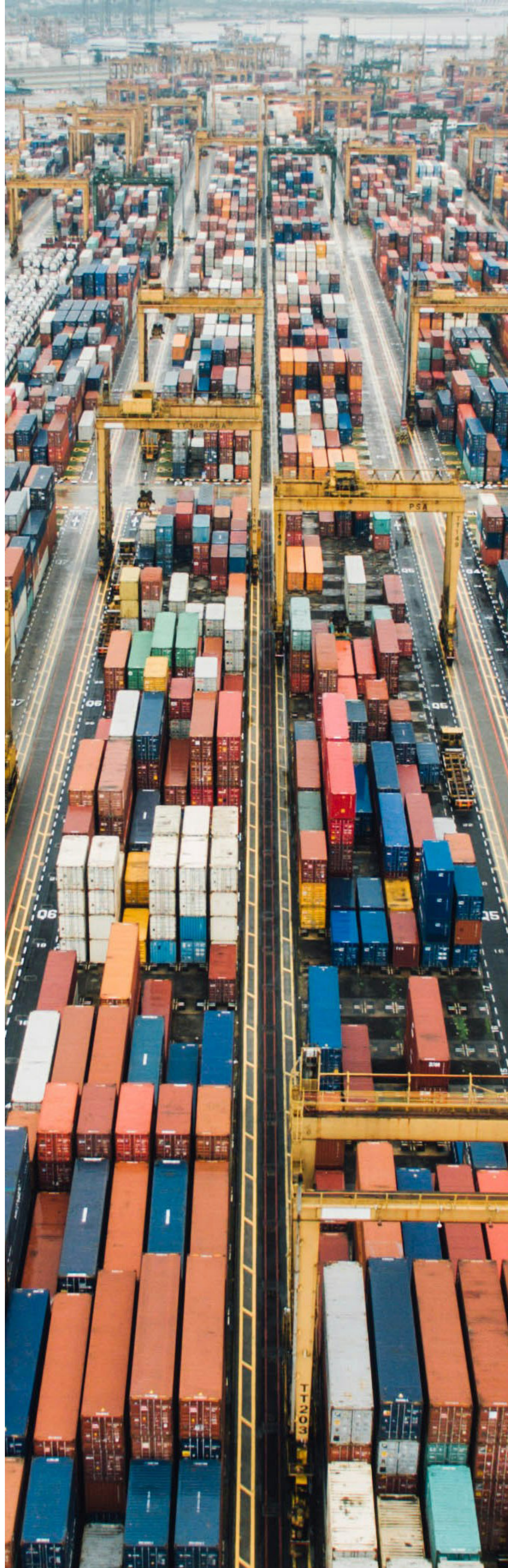
> **"We can absorb a tariff. What we cannot absorb is not knowing whether it will still be there next month"**
>
> Senior Logistics Executive, Guangzhou Roundtable

Confidence in resilience reflects this strain. Only 30% of respondents rate themselves as highly resilient. The majority (56%) describe their position as manageable but vulnerable to shocks. A further 8% report being exposed to serious risk.

The uncertainty has fundamentally altered decision-making. Firms are shortening planning horizons, deferring irreversible investments, and embedding contingency thinking into routine operations. The shift is most pronounced among SMEs, for whom a single disruption can threaten survival rather than merely compress margins.

Even businesses not directly trading with the US are affected through customers and logistics chains linked to US markets.

Semiconductor and advanced manufacturing supply chains face a particularly acute version of this problem: some customers demand no Chinese origin, while others demand only Chinese components. The result is compliance puzzles that have no clean solution for firms operating across both markets.



80% of Firms Plan to Stay or Grow in China

Despite the diversification rhetoric, China remains central to supply chains — and firms do not expect that to change.

More than half of respondents (56%) primarily rely on China for their supply chain, with a further 18% using China alongside at least one alternative. Just 2% have relocated away from China entirely. Meanwhile, 58% source at least half of their inputs from the Chinese market and 44% source 75% or more.

Participants were consistent on why. China's advantage is not just cost. It is ecosystem completeness: dense supplier networks, rapid tooling and iteration, integrated logistics, skilled engineers, and production scalability at a level that few other markets can match.

Where Diversification is Heading

Where firms are diversifying, Southeast Asia is the primary destination (30%), followed by South Asia including India and Latin America (both 12%). But the experience has been sobering. Firms that moved to Southeast Asia frequently ran into immature supplier ecosystems, quality issues, and costs 10 to 15% higher than China, partly because raw materials still have to be shipped from China anyway.

Several participants who had moved production to Vietnam or Indonesia said they were keeping their China operations as a fallback. And 50% of respondents cited China itself as a region where they have started or increased supplier use. The picture is not one of departure but of hedging.

A visit to Yantian International Container Terminal showed why. The port handles 300,000 TEU in annual exports to the UK alone, operates 20 deep-water berths, processes 22,000 trucks daily, and is now connected by a new railway that has cut Chengdu transit time from one week to two days. The infrastructure is hard to walk away from.

A recurring theme in the discussions was the idea of "Made by Chinese" rather than "Made in China". Chinese manufacturers are setting up production abroad while continuing to source inputs from China, extending their supply chain reach rather than replacing it.

How Firms Currently Source From China

China + one alternative	17%
Primarily rely on China	56%
Significantly diversified	21%
Relocated away from China	2%

Intention for China Over the Next Three Years

Intentions for China Over the Next Three Years

Looking ahead, the picture is even clearer. When asked about their intentions for China over the next three years, 48% plan to maintain their current level of involvement and 35% plan to expand. Just 6% intend to reduce. Zero plan to exit. That is a strong signal that for most businesses, the question is not whether to stay in China but how to manage the risks of doing so.

Economic confidence reinforces this picture. 85% of respondents are confident in China's economic outlook, with 47% very confident. The UK sits at 66%. Neither market drew a single "not confident at all" response. The US was the outlier: opinion split almost exactly 50/50 between positive and negative, making it the only market where half of respondents expressed outright concern.

One in Four Firms Have Made No Supply Chain Changes at All

Watching and waiting remains the most common strategy. But for many SMEs, it may be the only one they can afford.

The survey covers businesses across logistics, manufacturing, professional services, retail, and construction, and the responses show that adaptation is happening across the board but in very different ways depending on firm size and exposure.

The most common response is increased monitoring of geopolitical risk (32%), which tells us that for many businesses the first step has simply been paying closer attention. Beyond monitoring, firms are making concrete operational changes: 20% have relocated production, 20% have increased inventory or stockpiling, 18% have shifted transport modes (typically from sea to air), and 10% have re-routed shipping or changed labelling. However, 24% of respondents report making no adjustments at all, a significant minority that most likely reflects a lack of capacity to act rather than low exposure.

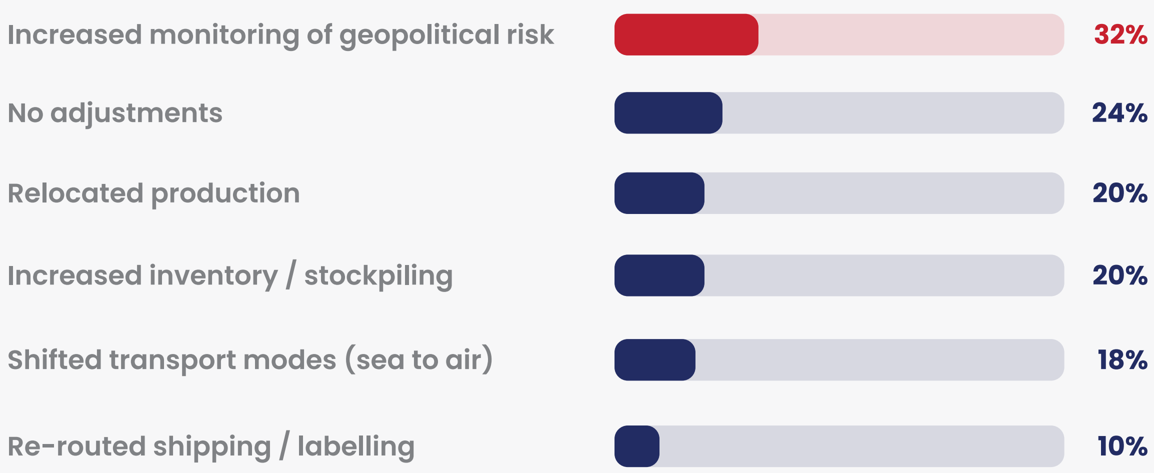
Building Supply Chain Optionality

Across the roundtables, the concept of "supply chain optionality" emerged as the defining strategy among firms that are managing disruption well. Optionality means the ability to switch, re-route, or reconfigure production and sourcing quickly when conditions change. It goes beyond simple diversification. Building it requires upfront investment in supplier qualification and relationship-building, modular product design that allows component substitution, real-time tracking of inventory and risk, and the managerial expertise to coordinate fragmented networks.

One tier-one automotive supplier with significant global market share described reorganising into four regional divisions and shifting from sequential to parallel production processes, starting stage two before stage one is confirmed, to meet the dramatically shorter lead times demanded by Chinese OEMs (one year, compared with five years for global OEMs).

A sourcing and supply chain management firm described building "risk-weighted spread" through offices in Vietnam and Thailand alongside China operations, maintaining dual supply for all components and the ability to switch quickly if conditions shift. A mid-sized manufacturer with over 250 employees

Adjustments Made to Supply Chain in the Past 12 Months



has relocated some production to Southeast Asia while keeping China as a fallback, a pattern echoed by several other participants.

One of the largest logistics firms in the survey has significantly diversified its operations across multiple regions while maintaining its Greater Bay Area headquarters. Their approach reflects a broader trend: firms are not choosing between China and everywhere else. They are building the capacity to operate across both.

Some participants also pointed to the growing role of technology in managing supply chain complexity, including AI-powered forecasting, digital twins, and real-time inventory tracking. These tools were cited as increasingly important for firms managing fragmented supplier networks across multiple regions.

Policy Uncertainty Is the Top Barrier to Resilience for Nearly Half of Firms

Policy uncertainty is the top barrier to building resilience, but cost, alternatives, and regulation all compound the challenge.

The survey asked respondents to identify the biggest barriers to improving their supply chain resilience. The results reveal a layered problem where multiple constraints reinforce each other.

Uncertainty about future policy leads at 46%, consistent with the qualitative finding that it is not tariffs themselves but their unpredictability that does the most damage. Cost of change follows at 34%. 18% cite a lack of good alternatives. Regulatory complexity (16%), supplier reliability (14%), and internal capacity (14%) round out the picture.

These barriers do not exist in isolation. They compound. A firm facing policy uncertainty is less likely to invest because the return is unpredictable. A firm that cannot access finance is less able to absorb the cost of change. A firm that lacks internal capacity cannot navigate regulatory complexity. The result is a compounding effect that falls hardest on smaller businesses.

Biggest Barriers to Improving Resilience

Uncertainty about future policy	46%
Cost of change	34%
Lack of good alternatives	18%
Regulatory complexity	16%
Supplier reliability	14%
Internal capacity / management time	14%

External Support Needs Cited by Businesses

Networking with partners	38%
Better market / policy intel on China	23%
Help diversifying suppliers / locations	15%
Case studies and best practice	13%
Guidance on regulations / compliance	8%
No support needed	2%

The Finance Gap

Finance consistently emerged as the factor that separates firms that can adapt from those that cannot. Moving from just-in-time to stockpiling raises inventory holdings and extends cash conversion cycles. Qualifying new suppliers in new countries costs money and management time. SMEs in particular face acute difficulties when banks remain risk-averse and trade finance instruments are geared towards exports rather than imports. The gap between what resilience requires and what the financial system provides is one of the clearest findings of the programme.

Policy Uncertainty

Policy uncertainty dominated every roundtable. Tariffs change month to month, customs policies are applied inconsistently, and investment security rules shift without warning. Firms can price in a known cost. They cannot plan around one that might not exist next quarter. Even businesses not directly trading with the US are affected through customers and logistics chains linked to US markets.

Compliance Frictions

Regulatory and compliance frictions ranked fourth in the survey but drew outsized attention in the roundtables. VAT rebates, customs procedures, and end-user checks were cited as under-acknowledged barriers, with businesses reporting inconsistent treatment at borders. Compliance capacity has become a competitive differentiator: firms that can navigate complexity trade internationally; those that cannot are excluded.

Lack of Good Alternatives

Moving one part of the chain often reveals dependency on Chinese inputs upstream. Firms are not lacking willingness. However, they are constrained by shifting rules, insufficient finance, immature alternatives, and regulatory burden that falls hardest on those least equipped to bear it.

Net Zero is a Supply Chain Problem First

Big carbon savings are hiding in freight routes and supplier habits

For companies that buy and move goods globally, roughly 85% of their carbon emissions sit in Scope 3: emissions embedded in purchasing decisions, supplier operations, and logistics. That makes decarbonisation a supply chain challenge, not something that can be handled by a central ESG team. It requires the same people managing resilience (supply chain, operations, procurement, and finance) to also own the carbon agenda. The two problems are connected.

This was the central finding of the BCCSC Net Zero Conference in Guangzhou on 10 March 2026, where speakers from Zero Pro, Re:cycle/Nespresso, Cathay Pacific, and BSI presented practical case studies alongside a panel discussion with DBT South China.

85%

The share of total carbon that sits in Scope 3 for companies that buy and move goods globally.

Are Hiding in Plain Sight

The case studies showed that substantial carbon reductions are often sitting in freight routes and supplier habits. Analysis presented at the conference showed that a US apparel brand could reduce transportation carbon per t-shirt from 3.52 kg to 16 grams, a 99.5% reduction, simply by relocating its distribution centre to Singapore. A similar exercise for a Norwegian company found that switching one air freight leg to sea would cut 14% of total product carbon.

99.5%

Reduction in transport carbon per t-shirt by relocating distribution

14%

Total product carbon cut by switching one air freight leg to sea

> **“Most companies can take 30% of emissions out of their supply chain through operational changes alone, if they have the data to see where the waste sits”**
>
> Sustainability Advisory Firm, Net Zero Conference

Proof of Concept

Nespresso has committed to net zero by 2035, 15 years ahead of parent Nestlé, and has already achieved a 24% carbon footprint reduction per cup since 2009. Its capsules are now made from 80% recycled aluminium. Cathay Pacific showed how sustainability can shift from compliance to culture, turning its Corporate SAF Programme into a commercial product for cargo and corporate customers including DHL, HSBC and Microsoft.

24%

Nespresso achieved a 24% carbon footprint reduction per cup since 2009

Chinese SMEs and the Going Global Imperative

Chinese manufacturers face growing emissions disclosure demands as the EU's Carbon Border Adjustment Mechanism (CBAM) and Corporate Sustainability Reporting Directive (CSRD) take effect. No Chinese company has yet certified through BSI's net zero pathway standard. That is both a gap and a first-mover opportunity. The firms that get there first become preferred suppliers and set procurement benchmarks for their sector.

The Consumer Trust Problem

Greenwashing scandals have eroded consumer confidence to the point where even legitimate claims are hard to land. The recommended approach is delta-based communication: "this year's shirt travelled 14% less" rather than absolute claims that invite legal challenge.

Cathay Pacific's consumer research in Hong Kong illustrates the challenge. Customers say they support sustainability, but their maximum tolerance for a price premium is under 20%. Sustainable products are routinely priced more than 20% above standard alternatives. The gap between what consumers say they want and what they will actually pay for is structural.

0

The number of Chinese companies that have certified through BSI's net zero pathway standard. The first to do so will set the benchmark for their sector.

The Data Constraint

The deeper problem is simpler. Most companies lack the supply chain data to act. The technology and standards exist, but the bottleneck is data collection at supplier level.

What this Means for UK Businesses

For UK businesses, this creates both a risk and an opportunity. Firms that are not preparing for CBAM and CSRD face a new layer of supply chain friction on top of the tariff and geopolitical pressures already described in this report. Those that get ahead of it gain a competitive edge.

The UK's strengths in green finance, ESG advisory, and sustainability certification mean it is well placed to help Chinese suppliers navigate these requirements, and to benefit commercially from doing so.

Several survey respondents independently identified green technology, renewable energy, and green finance as the single biggest opportunity for UK-China trade, reinforcing the commercial logic of continued engagement and the UK's natural position as a partner in the net zero transition.

"Green technology, renewable energy, and green finance"

Top UK-China opportunties cited by respondents in open-ended survey responses

Quantitative Data

Respondent Profile

Where is your organisation headquartered?

China	74%
United Kingdom	14%
North America	8%
Europe (exc. UK)	4%

How many people does your organisation employ?

250 or more	36%
1 to 9	20%
10 to 49	20%
50 - 249	20%
Sole Trade	4%

Main business activity

Logistics, transport or storage	34%
Manufacturing or production	28%
Professional or financial services	16%
Retail or wholesale	10%
Construction / engineering	4%
Other	8%

China Supply Chain Exposure

Approximately what share of your inputs come from China?

100%	18%
75–99%	26%
50–74%	14%
25–49%	18%
1–24%	18%
0%	6%

Current supply chain approach

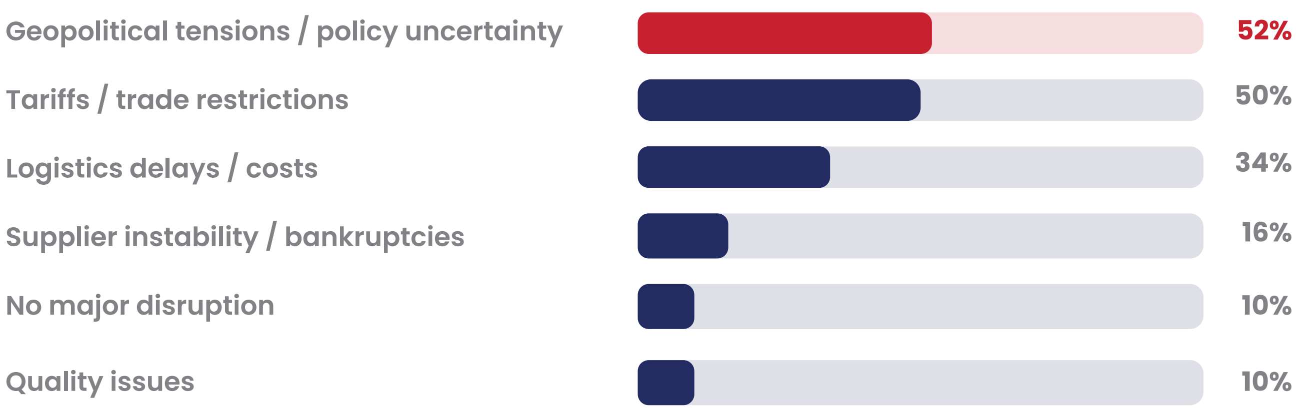
Primarily rely on China	56%
Significantly diversified	21%
China + at least one alternative	17%
Unsure	4%
Relocated away from China	2%

Sell goods/services made in China to outside markets

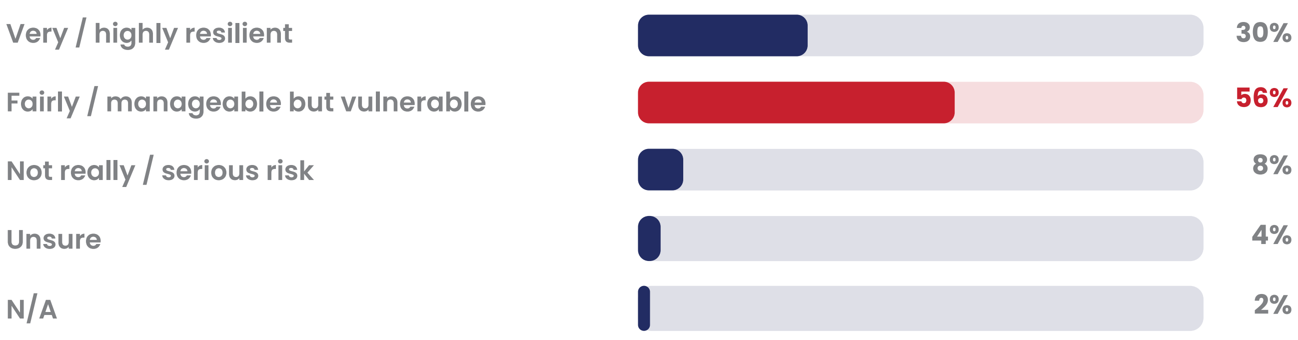
Regulary	82%
Occasionally	14%
Never	4%

Disruption and Resilience Confidence

Sources of supply chain disruption

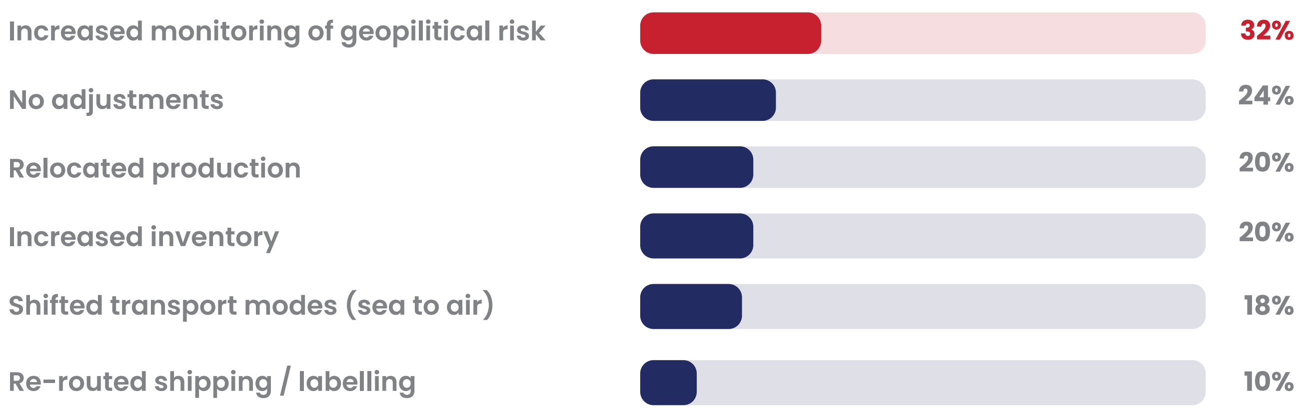


Confidence in supply chain resilience over next 12 months

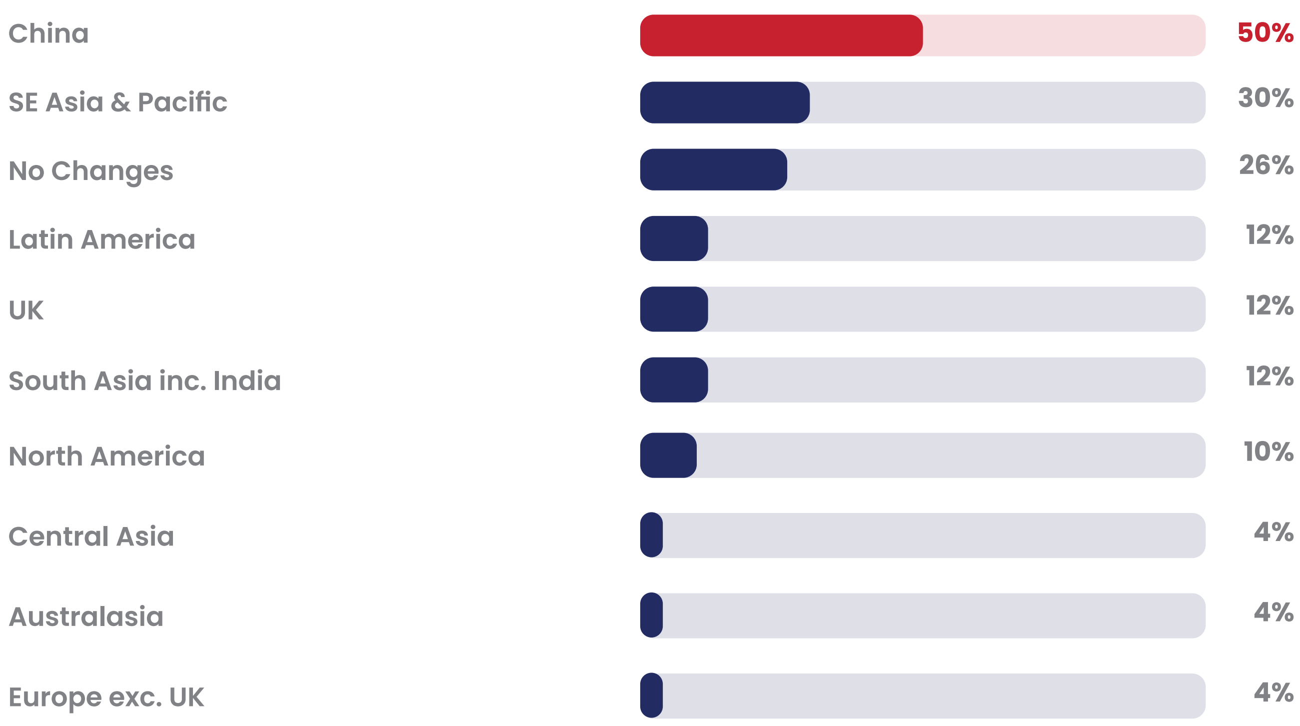


Supply Chain Adjustments

Adjustments made in past 12 months

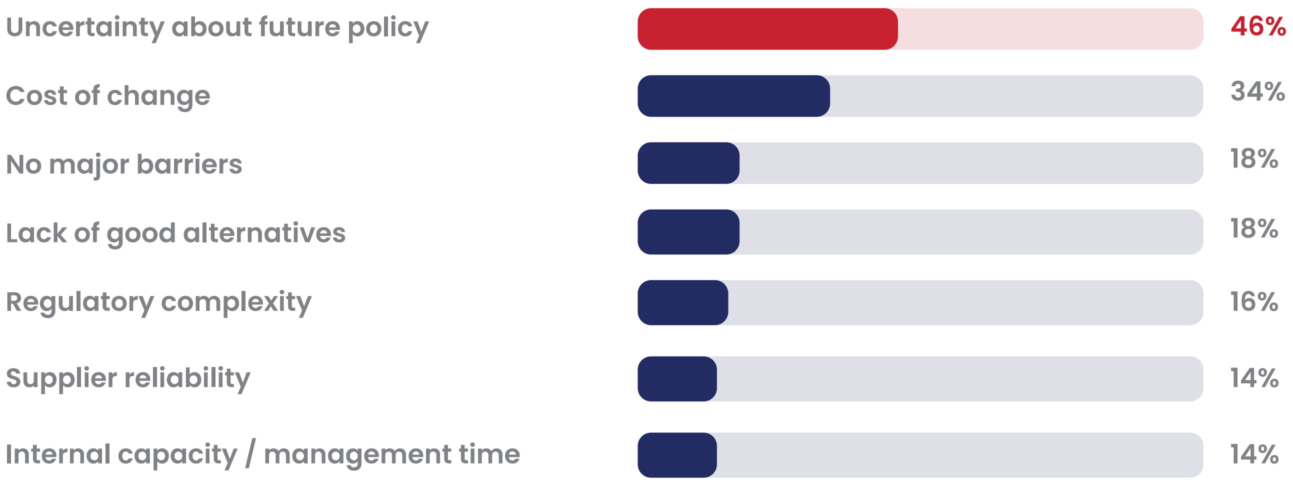


New/increased supplier regions used

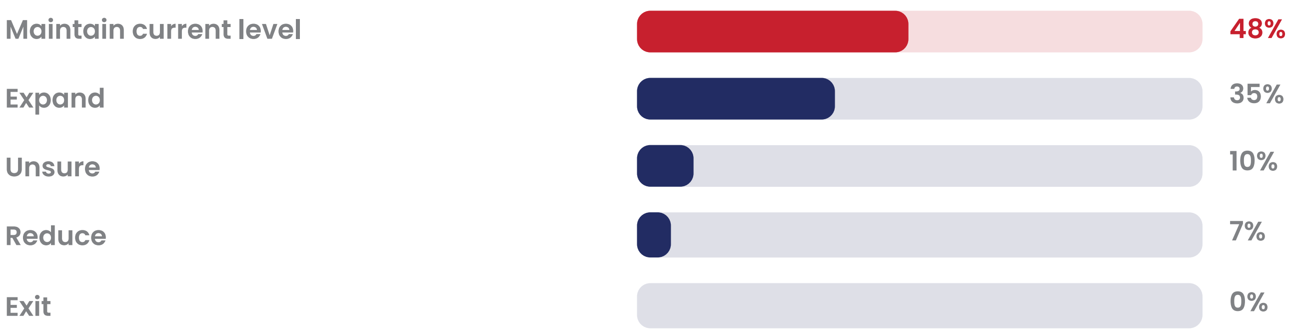


Barriers and Future Intentions

Biggest barriers to improving resilience

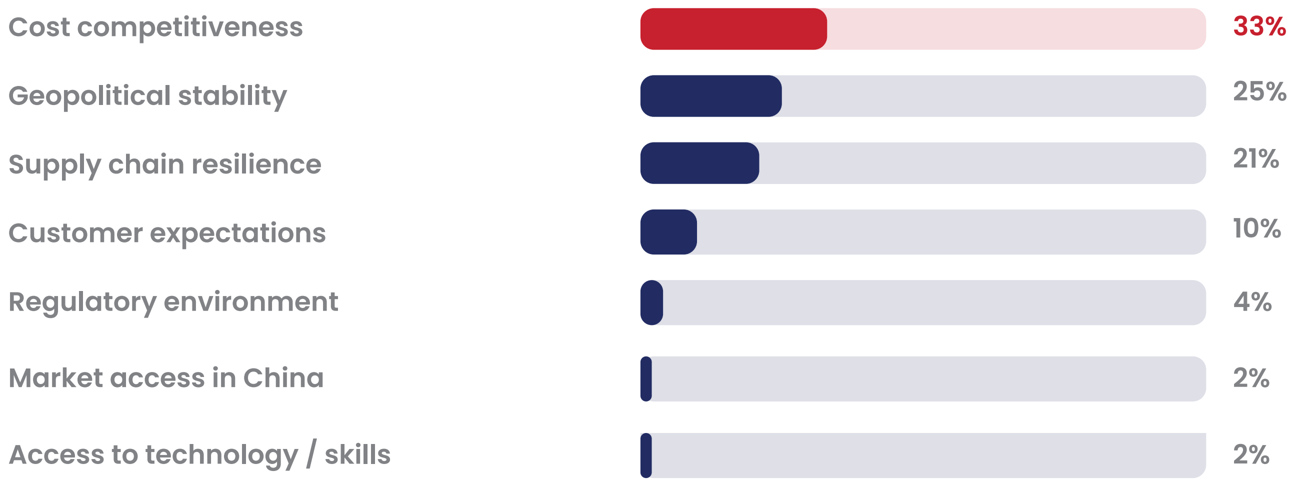


Intention for China over the next 3 years

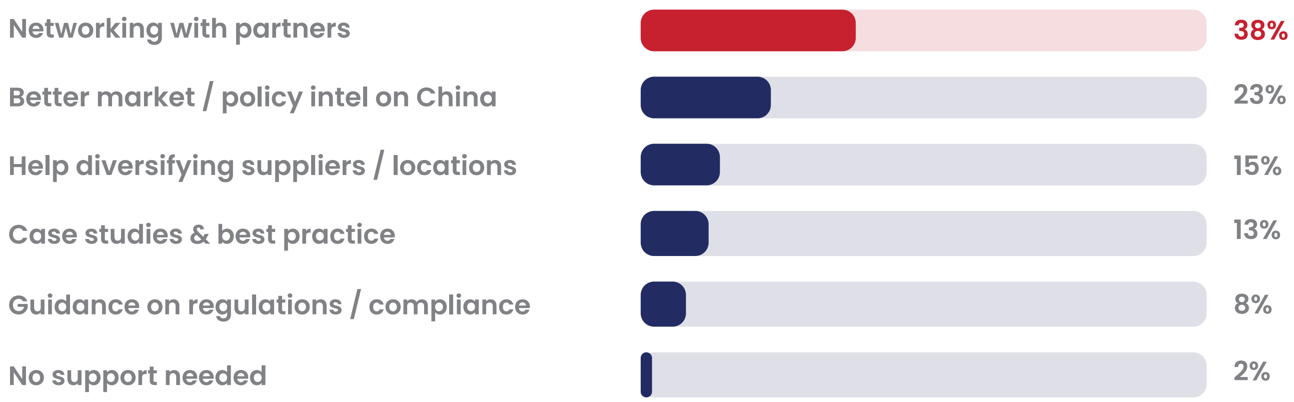


Strategy Drivers and Support Needs

Most important factor shaping future China strategy



Most useful type of external support right now



Economic Confidence

Confidence in economic outlook: China

Very confident	47%
Fairly confident	38%
Not very confident	16%

Confidence in economic outlook: UK

Very confident	15%
Fairly confident	51%
Not very confident	34%

Confidence in economic outlook: USA

Very confident	11%
Fairly confident	39%
Not very confident	39%
Not confident at all	11%

Methodology

The Supply Chain Resilience Survey 2026 was conducted during December 2025 - January 2026 as part of the BritCham South China Supply Chain Resilience Week programme, with support from the UK Department for Business and Trade. 50 responses were received.

The programme also benefited from the active participation of senior officials and subject matter experts travelling from the United Kingdom, whose engagement across the roundtable sessions provided a direct link between the on-the-ground findings and the policy priorities of UK government. Their presence ensured a two-way exchange: contributing UK government perspective to the discussions and carrying the operational intelligence gathered back into Whitehall planning processes.

The qualitative component comprised three roundtable discussions (Shenzhen, Guangzhou, and Shanghai), site visits to Yantian International Container Terminal, MagLab, and the Dongguan Innovation Research Institution, and bilateral stakeholder meetings.

The Net Zero Conference was held on 10 March 2026 at PW & Partners Law Firm in Guangzhou, convening 25 delegates with presentations from Zero Pro, Re:cycle/ Nespresso, Cathay Pacific, and BSI.

This report was produced by the British Chamber of Commerce South China with the support of the Department for Business and Trade.

Conclusion and Recommendations

Strengthening UK supply chain resilience through managed interdependence

Resilience has become a central strategic objective for firms, but it remains weakly supported by policy. China remains a cornerstone of global manufacturing, not by default but by systemic advantage. Understanding that advantage requires a shift in framing: what businesses are actually managing are not chains but supply webs: dense, multi-directional networks where disruption at any node ripples outward in ways that are rarely visible until the effect lands. The recommendations below are designed to help UK businesses thrive in China and build more resilient supply chains that contribute to the UK economy, while also encouraging Chinese supply chain enterprises to find partnerships and opportunities in the UK. The goal is not decoupling but managed interdependence: supporting firms as they rebalance risk while strengthening the trade relationships on which both economies depend.

One theme that surfaced repeatedly, though less in formal presentations than in the margins of roundtable discussion and receptions, was the enduring legacy of COVID-19 on how businesses think about risk. The pandemic exposed a generation of supply chain managers to the reality of single-point dependencies: critical components sourced from single factories, in single regions, with no alternative in place. Many of the behaviours documented in this report, increased monitoring, stockpiling, supplier qualification across multiple geographies, the concept of "supply chain optionality", are direct responses to that experience. The businesses that adapted fastest during COVID were those that had already invested in redundancy; the businesses adapting fastest now are those applying the same logic to geopolitical and logistics risk. The lesson has not been forgotten. But with planning horizons shortening and margins under pressure, the risk of complacency returning, particularly among SMEs without dedicated resilience resource, remains real. FCDO and DBT programming should continue to treat pandemic preparedness in supply chains and geopolitical resilience as the same underlying discipline, not separate workstreams.

01

Strengthen Trade Finance and Working Capital Support

Cost of change (34%) is the second-largest barrier to resilience and SMEs face the sharpest difficulties. UKEF's mandate should be reviewed to cover multi-country supply chain financing, including the import side. Shared-risk lending models should be explored.

02

Improve Market and Policy Intelligence

23% of respondents cite better intelligence as their top support need. The FCDO and DBT should find ways to provide businesses with timely, operationally relevant information on tariff changes, regulatory developments, and sector-specific risk assessments in both China and the UK. An annual resilience survey would help build the evidence base over time.

03

Position the UK as a Partner in China's Green Transition

Multiple respondents independently identified green technology, renewable energy, and green finance as the single biggest opportunity for UK-China trade. The FCDO and DBT should support initiatives such as net zero certification programmes for Chinese manufacturers and dedicated sustainability events connecting UK expertise with Chinese supply chains.

04

Expand Supply Chain Engagement Across South China and Beyond

38% of respondents said networking with partners is the most useful form of external support. The FCDO and DBT should fund an expanded annual programme of roundtables and site visits in key manufacturing clusters beyond Shenzhen and Shanghai, including Dongguan, Zhongshan, Foshan, Zhuhai, Changsha, Xiamen, and Chengdu/Chongqing.

05

Run Sector-Specific Roundtables and Business Matchmaking

The FCDO and DBT should fund targeted roundtables in logistics, manufacturing, and professional services, bringing together UK and Chinese businesses with shared supply chain exposure. These should include structured matchmaking to directly address the networking gap identified as the top support need in the survey.

06

Commission an Annual Supply Chain Resilience Survey

The 2025 survey has already generated significant policy-relevant data. The FCDO and DBT should fund a formal annual survey with an expanded sample size, timed to feed into the UK Government's China strategy review and provide a longitudinal evidence base for policy decisions.

07

Use These Findings to Inform HMG's Own Supply Chain Dependency Assessment

The evidence in this report has direct implications beyond UK business support programming. The finding that 74% of surveyed firms rely primarily or substantially on China, combined with the systemic role China plays across logistics, manufacturing inputs and critical materials, points to meaningful exposure within HMG's own procurement and supply base. FCDO and DBT should share this report with supply chain leads across Whitehall including DSIT, DESNZ, and the Cabinet Office Resilience Directorate and use it as a prompt to review the extent to which UK government supply chains face analogous dependencies. An inter-departmental working group with a remit to map HMG's tier-two and tier-three China exposure would be a proportionate and timely response.

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