

Making Sense of the Brave New World

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Annual Meeting Davos 2026

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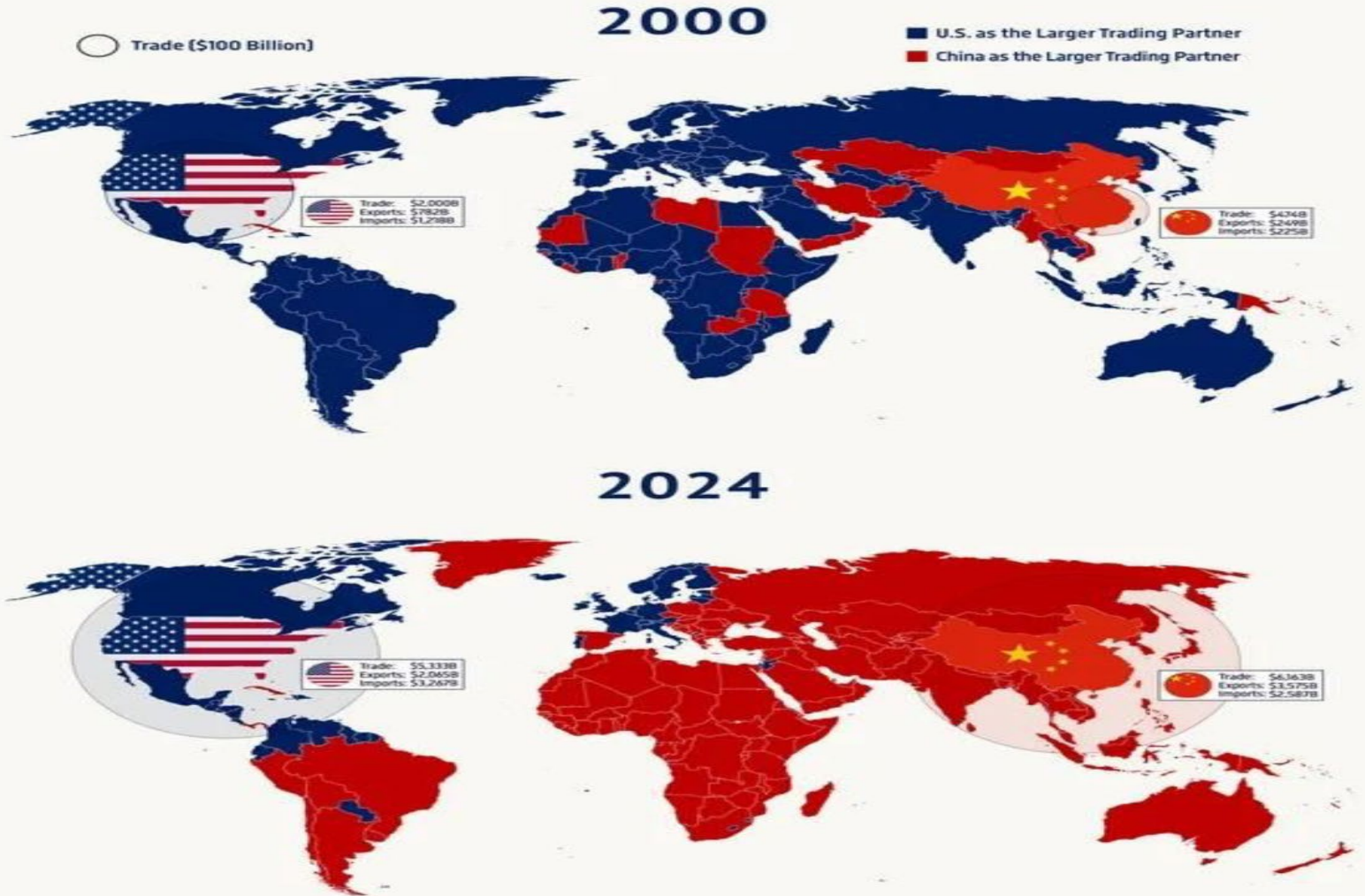
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The rise of China



Global Trade Dominance: U.S. vs. China

In 2000, U.S. trade totaled \$2.0 trillion—more than four times China's \$474 billion. From 2000 to 2024, U.S. trade expanded by 167% [4.2% CAGR], while China's trade surged by 1,200% [11.3% CAGR], surpassing the U.S. in 2012. By 2024, total trade reached \$5.3 trillion for the U.S. and \$6.2 trillion for China.



Merchandise trade = exports plus imports
The data on U.S. trade partners is sourced from the U.S. Census Bureau and data on China's trade partners comes from the General Administration of Customs.

Sources: U.S. Census, Customs of China

Research and visualization: Ehsan Soltani

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The disappearing middle class and the rise of the 1%...

Distribution of Household Wealth IN THE U.S. BY INCOME GROUP

TOTAL HOUSEHOLD WEALTH

\$100T

\$50T

\$0

1990

2000

2010

2020

INCOME GROUPS

Top 0.1%

Top 1%

90-99%

50-90%

Bottom 50%

The share of wealth owned by the top 0.1% is currently at its peak

The share of wealth owned by the bottom 50% hit its low point of 0.4% in 2011

Source: The Federal Reserve







QUESTIONS?



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