

# North America Trade Report



North America set to deliver strong growth in 2018 after healthy 2017

US Gulf Coast To Outpace East And West Coasts As Homegrown Issues Weigh

Canadian Volumes To Be Boosted By Second Trade Pact In As Many Years

US Retailers Put Pressure On Shipping Line Industry



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# North America Trade Report

North American trade is set to deliver another year of robust growth. The US and Canada will benefit from an expected increase of more than 3% in global trade volumes this year as US consumers underpin imports and Canadians gain from the signing of a free trade agreement covering a US\$12.6 trillion market, according to the world's largest shipping company Maersk Line.

However, the US and Canada, which have grown at similar accumulative rates of 8.7% and 8.3% from 2015 to 2017, have two very different tales to tell this year. For the US, gains will come from retail, chemicals, consumer electronics and grains sectors but the nation faces a number of homegrown issues as the import-to-export

gap continues to widen. The US is facing a trucking crisis, rail infrastructure needs to be updated, terminal competitiveness lags behind other countries, while digital transformation is putting pressure on the way the US does trade – not to mention the bunker fuel hikes and terminal congestions persist. Meanwhile, the outlook is more positive for Canada, which promises to be one of the fastest growing markets in terms of container trade across the Americas this year.

In 2017, US total maritime container imports and exports grew 4.7%, up from 3.9% in 2016, while Canadian total imports and exports expanded 6.9%, up from 1.4% in 2016. The US accounts for 24% of all global

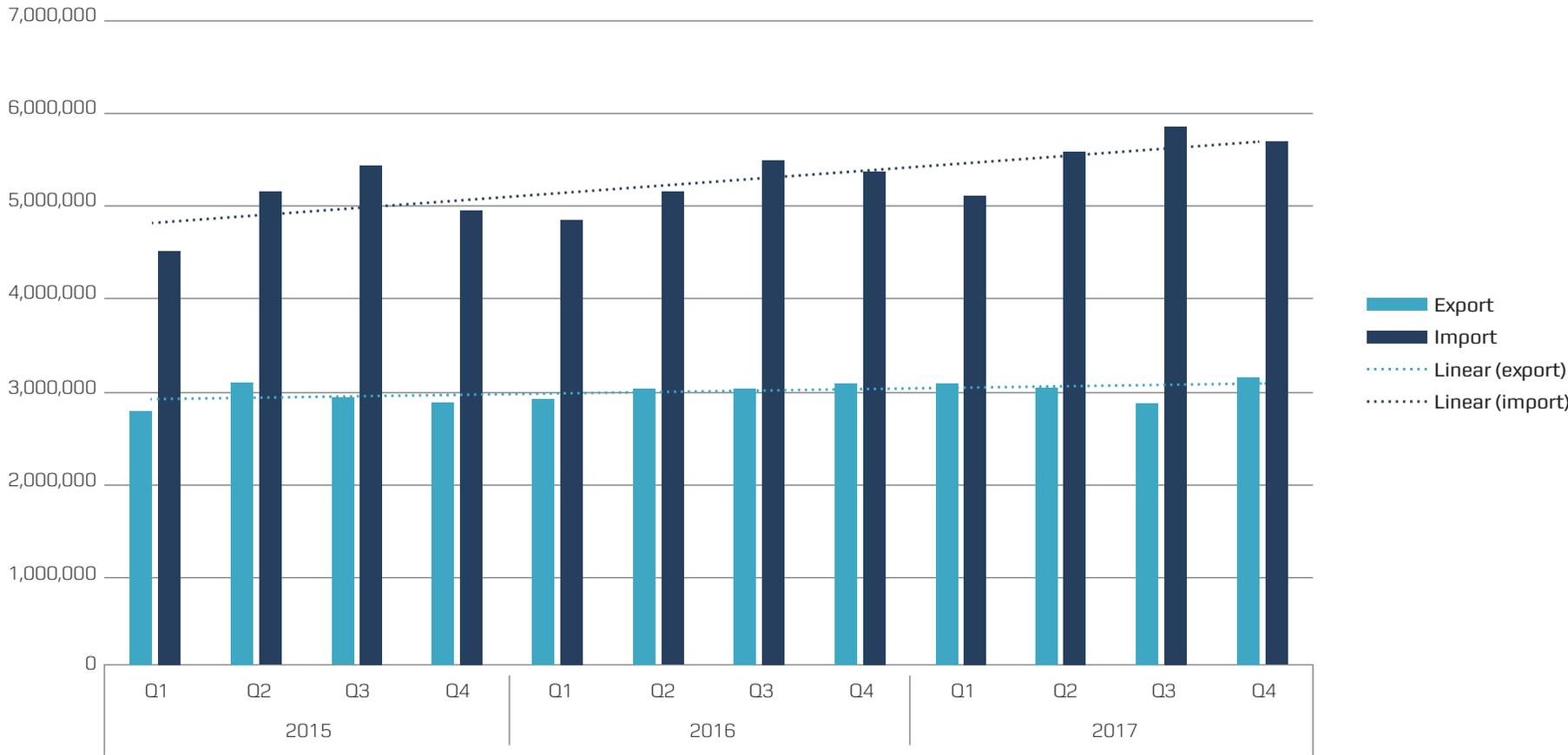
container trade, which moves more than US\$4 trillion worth of goods a year. Maersk Line moves approximately one in five containers around the world.

“The US and Canada are growing and yet they are in two very distinct moments. The US is in digital disruption and transformation, putting pressure on the way the nation trades, so much so that the end-goal must change so that booking a container and moving it across continents becomes as easy as posting a parcel, helping US business flourish locally and globally,” says Omar Shamsie, President for Maersk Line North America. “It sounds far-fetched when you consider how the industry does business now, but the future of the whole supply chain needs to be

discussed at the highest levels, US competitiveness needs to come under a magnifying glass so the whole industry and authorities can address new ways of narrowing the ever-increasing gap with imports and update itself in the face of digital disruption and increasing competition from Asia, Latin America and Europe,” he adds.

Parent company A.P. Moller-Maersk is already taking steps to help overhaul global trade after unveiling in January a joint venture with IBM to create an industry-wide paperless platform that is aimed at speeding up trade transactions, boosting transparency for clients and ultimately saving billions of dollars.

# US Trade Between 2015 and 2017 in TEUs\*



Imports show steady growth since 2017 but exports hover as the gap between imports and exports grow. \*TEU: Twenty-foot equivalent sized container

# 2018 FORECAST

For 2018, Maersk Line forecasts total US exports and imports will grow a minimum of 2% to up to 4% and for Canada, the country is seen expanding 7% or more as it benefits from its first full year of free trade with the European Union after securing CETA, or The Comprehensive Economic and Trade Agreement, at the end of last September.

Now, Canada is moving closer to signing the CPTPP (Comprehensive and Progressive Agreement for Trans-Pacific Partnership) accord, involving 11 nations including Japan, Chile, Australia, Malaysia, Singapore, Vietnam, and more, accounting for 15.8% of the world's GDP.

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The **CPTPP** will **boost** trade further, this time on the Pacific, adding to **CETA's positive impact** on the Atlantic.

We can expect **gains** to come through the West coast ports of **Vancouver** and **Prince Rupert**, the

latter offering the shortest distance between North America and Asia. They are both growing as competitive gateways for West Coast North America volumes.

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**Jack Mahoney**  
President for Maersk Line Canada

## Total Exports and Imports With Year-on-Year Growth and Forecast

	2016	2017	2018E
<b>US</b>	3.9%	4.7%	3%+
<b>Canada</b>	1.3%	6.9%	7%+

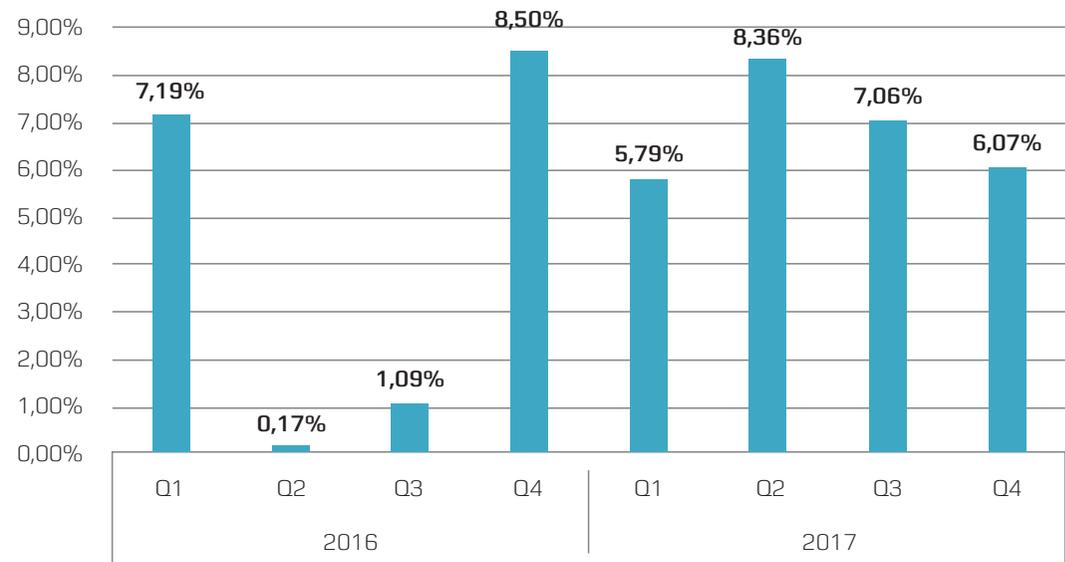
# US Imports

Imports underpinned overall US trade growth in 2017 thanks to healthy consumer demand. Imports grew 6.8% in 2017 versus 4.1% growth in 2016. Maersk Line forecasts that imports will grow from a minimum of 3% up to 5% in 2018 thanks to factors such as higher wages, lower unemployment and slightly higher GDP growth this year.

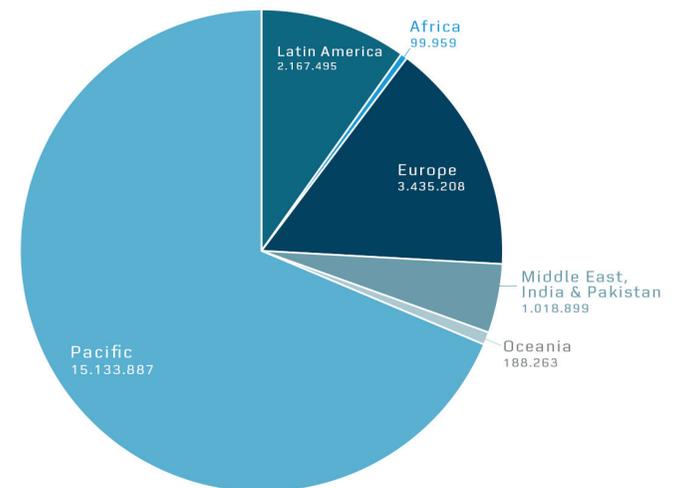
**“We are optimistic on US imports this year thanks to strong consumer growth, historically low unemployment and strong consumer confidence,”** says Christian Pedersen, Head of Trade & Marketing for Maersk Line North America.

**“Last year far exceeded our growth expectations and we still foresee strong imports growth in the range of 3% to 5% for 2018,”** he adds.

## US Imports 2016 - 2017



Imports from China alone accounted for more than a third of all imports after US demand for its products grew 7% in 2017 to 677,424 TEUs. Imports from Asia as a whole (PACIFIC trade), represented nearly three quarters of all imports to the US in 2017.





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While we saw some of the strongest import performances from countries like **India, Germany, China, Vietnam and Turkey in 2017**, the results underscore that the US is ultimately a net importer with a growing trade imbalance. For every two containers that are imported into the country approximately one is exporter; however, on the west coast this ratio is closer to three to one. Legislative, commercial and investment initiatives **are necessary to boost exports** to create a better weighted trade balance.

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**Christian Pedersen**

Head of Trade and Marketing for Maersk Line North America.

In 2017, the nations to enjoy some of the biggest gains when taking into account the size of their TEU volumes and leadership in their own region were:

	TEUS	% Diff
<b>China</b>	677,424	7%
<b>Costa Rica</b>	55,411	30%
<b>Germany</b>	46,635	6.2%
<b>India</b>	60,177	11%
<b>Mexico</b>	29,691	23%
<b>Nigeria</b>	1,397	77%

% Diff is the growth in TEU volumes imported from each country in 2017, compared to 2016.



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Given the widening gap between imports and exports in the US, you end up shipping more empty containers – this adds unnecessary costs in supply chains.

Putting the spotlight on US competitiveness, there's more to be done in existing infrastructure and processes like reducing paperwork and streamlining the number of handovers involved in the administration of a container entering and exiting a country. This for us is just the start.

Going digital and reducing the time it takes to book a container as well as move it through a terminal is another part of the equation.

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**Omar Shamsie**

President for Maersk Line North America

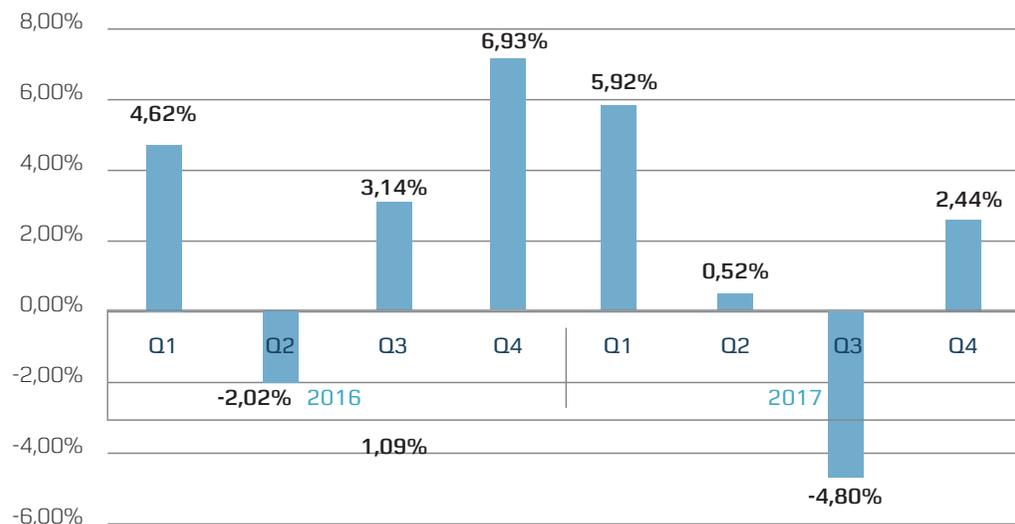
# US Imports 2017

In terms of commodities, furniture, appliances, plastics and miscellaneous manufactured materials were among the biggest movers in 2017, respectively up 13%, 7%, 7% and 10%.

Commodities	IMPORTS 2017	
	Diff (TEUS)	Diff (%)
ART AND ANTIQUES	1,369	8.67%
BEVERAGES	19,095	3.47%
BONE AND MEAL	-137	-1.63%
CHEMICALS	38,809	9.41%
DAIRY PRODUCTS, BIRDS EGGS AND HONEY	-949	-2.32%
FERTILIZERS	629	3.85%
FISH	-1,470	-1.31%
FOOD RESIDUE & WASTE	3,609	13.72%
FOODSTUFF	36,498	6.56%
FRUIT AND NUTS	71,371	9.27%
FURNITURE	332,907	13.06%
GLUE & ADHESIVES	3,229	11.50%
HIDES, FUR, LEATHER AND SKIN	28,375	7.66%
HOUSEHOLD GOODS	-4,566	-4.06%
MACHINERY, APPLIANCES (HOME AND INDUSTRIAL)	192,518	6.85%
MEAT	5,603	7.17%
METAL (SEMI-FINISHED AND FINISHED)	121,490	8.52%
METAL (WASTE AND SCRAP)	5,608	21.13%
MINERAL FUELS, OILS, WAXES	1,140	3.37%
MISCELLANEOUS MANUFACTURED MATERIALS	108,628	10.06%
MUSICAL INSTRUMENTS	-626	-3.26%
OILS AND FATS	-449	-0.82%
ORES, SLAG AND ASH	313	6.02%

OTHER	206	66.16%
PAPER (SEMI-FINISHED AND FINISHED)	21,654	4.34%
PERSONAL CARE AND CLEANING PRODUCTS	12,436	8.43%
PHARMACEUTICALS	2,892	5.96%
PLANTS	-597	-3.27%
PLASTIC AND RUBBER	132,551	6.97%
PYROTECHNIC PRODUCTS	-317	-1.72%
SALT, SULPHUR, EARTH, STONE, PLASTER, LIME, CEMENT	14,665	10.51%
SEEDS, BEANS, CEREALS, SPICES AND FLOUR	17,706	10.14%
SHELLFISH	5,920	6.27%
SPORTING GOODS	5,565	3.30%
TANNING / DYEING EXTRACTS, PAINTS, VARNISHES	5,366	12.58%
TEA AND COFFEE	4,111	3.67%
TEXTILES, APPAREL AND ACCESSORIES	30,404	1.28%
TILE, STONE AND GLASS	58,722	8.11%
TOBACCO	-1,759	-5.78%
TOOLS AND CUTLERY (HOME AND INDUSTRIAL)	9,815	6.44%
TOYS AND GAMES	37,539	4.96%
VEGETABLES	7,797	5.30%
VEHICLES AND TRANSPORTATION EQUIPMENT	17,396	1.36%
WASTEPAPER	-134	-2.85%
WOOD, CORK, STRAW AND OTHER	62,863	8.89%
WOODPULP AND OTHER PULP	3,964	18.57%

# US Exports 2017



US total exports grew 1% in 2017 versus a 3.1% expansion in 2016. Exports last year were impacted by China's decision to crack down on pollutants as well as suspending import licenses of recyclable goods and banning some materials to reduce pollution. This decision impacted the West Coast exports the most as wastepaper

exports dropped 14% to 164,906 TEUs in 2017.

"The Chinese government's decision impacted US as well as Mexican exports in the fourth quarter, but countries such as India as well as other Southeast Asian nations have the capacity to pick up at least some of the trade," says Pedersen.

For Maersk Line, US exports are expected to show moderate growth between 0% to 2% in 2018. The better performance is largely owed to expectations that resin exports will increase out of the Gulf Coast this year as companies like Chevron Phillips Chemical brings plants online and have announced investments in the 20billion dollar mark.

"The Gulf Coast is going to steal the limelight in 2018 and 2019 with the coming online of new chemicals plants as well as investments in new distributions centers, helping provide a positive impact on US trade," says Pedersen. "However, the West Coast is expected to underperform this year and next, losing trade to Canada because of cost inefficiencies in its infrastructure and need for greater rail competition," he adds.

## 2018E Total Imports and Exports

<b>Gulf Coast</b>	4%
<b>East Coast</b>	3%
<b>West Coast</b>	1%

# US Sectors

## Auto

For auto, new car sales growth is expected to decline in the US in 2018 but used car exports represent a growth opportunity, especially after the hurricanes of last year, providing more trade volumes out of the Gulf Coast this year.

Used cars exports are expected to go primarily to Africa and the Middle East. The US is the world's largest exporter of used cars, especially to developing nations.

"We are going to see a big jump in used car exports in 2018 once delays in the processing of their claims are resolved. Jebel Ali in Dubai is expected to attract significant volumes as it is a major hub for used auto auctions worldwide. We also see on the horizon volumes going to South East Asia but this will be in smaller quantities," says Pedersen. In 2017, vehicles and transportation equipment grew 11% to 89,198 TEUs.

"We see some volumes on the horizon going to S.E. Asia as well, but very small in comparison," says Pedersen.

**Cars is one of the biggest export items for the US.**



## Pharmaceuticals

The US exports pharmaceuticals products to approximately 126 countries around the world. Pharmaceutical exports grew 13% in 2017. The top five buyers of US pharma worldwide in 2017 in terms of volume were Indonesia, up 180%, Belgium 39%, Netherlands 26%, United Arab Emirates 32%, Latvia 303% and Colombia 29%.

## Retail, Electronics and Apparel

Retail is undergoing a shift as the biggest players continue to increase their weighting in terms of volumes and impact on US trade, primarily on the imports front, whilst the smaller and nimbler e-commerce companies slowly move up the ranks.



It is almost as if we are watching a game of musical chairs between brick-and-mortar and e-commerce retailers,



**Says Pedersen**

“The top 45% of all companies moving the biggest volumes in US trade are predominantly retail and are focused and succeeding in consolidating their positions further. The bottom 30% is declining but it seems the middle layer, or 25%, remains fairly balanced,” says Pedersen. “This serves as a mirror reflection of how e-commerce and bricks and mortar retailers are largely tussling it out as we see online retail increasingly leading the

way and concentrating further in US trade,” he adds.

However, US retailers, which Maersk Line forecasts will post another year of steady growth at 4% or more, are putting more pressure on shipping lines to change.

“Boosting the customer experience online and offline, further enhancing omnichannel strategies or exploring digital innovation such as augmented reality for apparel are changing the way the US retailers do trade as well as how consumers behave. This is having a knock-on effect on trade. Volumes grow steadily but the shift in the pie in favor of e-commerce means demands for simpler, faster and real-time services from shipping lines increase,” says Pedersen.

Consequently, going digital and reducing paperwork and administrative processes significantly are some of the ways of meeting growing demands from e-commerce retailers, which are focused on disruption by breaking down barriers to satisfy consumers with same-day deliveries.

Everyone is upping their game when it comes to retail," Says Shamsie. "For Maersk, our vision is to offer an end-to-end integrated global supply chain online to speed up deliveries and find smarter ways of getting goods in and out of a country either through Maersk Line, our global ports operator APM Terminals and freight forwarder Damco. We are working on key areas such as boosting reliability and transparency across the whole supply chain. We have introduced online quoting and booking tools, an APP to track goods, emote container management for refrigerated foods and

launching pilots with digital companies in and outside our industry. But we believe there are more opportunities and Maersk is keeping an eye out for smaller companies that bring technology, skill or new capabilities to our global story. Our final goal is to bring positive change to our customers. Container bookings have gone from hours in 2014 to minutes in 2017. We want to make shipping simple, fast and online."

**Omar Shamsie**  
President for Maersk Line  
North America

### Top Electronics Imports Growth By Country in 2017

Country	Volume in TEUs	% Growth
China	760k	2
South Korea	55k	3
Hong Kong	50k	2.3
Vietnam	44k	31.2

### Top Apparel Imports Growth By Country in 2017

Country	Volume in TEUs	% Growth
China	990k	3.1%
Vietnam	241k	7.6%
Indonesia	87k	-1.8%
India	81k	-0.5%

# US Exports 2017

Commodities	EXPORTS 2017	
	Diff (TEUS)	Diff (%)
ART AND ANTIQUES	-153	-24.18%
BEVERAGES	-5,373	-3.90%
BONE AND MEAL	2,729	21.59%
CHEMICALS	10,647	2.16%
DAIRY PRODUCTS, BIRDS EGGS AND HONEY	1,590	2.12%
FERTILIZERS	344	3.41%
FISH	16,321	31.05%
FOOD RESIDUE & WASTE	-95,924	-22.36%
FOODSTUFF	-34,416	-6.68%
FRUIT AND NUTS	-50	-0.02%
FURNITURE	3,486	2.61%
GLUE & ADHESIVES	317	1.45%
HIDES, FUR, LEATHER AND SKIN	8,806	11.36%
HOUSEHOLD GOODS	9,698	6.44%
MACHINERY, APPLIANCES (HOME AND INDUSTRIAL)	24,085	3.65%
MEAT	14,812	3.86%
METAL (SEMI-FINISHED AND FINISHED)	-30,148	-9.71%
METAL (WASTE AND SCRAP)	10,007	2.44%
MINERAL FUELS, OILS, WAXES	3,941	4.20%
MISCELLANEOUS MANUFACTURED MATERIALS	71,240	8.81%
MUSICAL INSTRUMENTS	446	12.29%
OILS AND FATS	5,206	30.60%
ORES, SLAG AND ASH	440	6.34%
OTHER	-922	-36.41%
PAPER (SEMI-FINISHED AND FINISHED)	38,037	6.91%

PERSONAL CARE AND CLEANING PRODUCTS	-2,661	-1.85%
PHARMACEUTICALS	5,541	13.11%
PLANTS	679	14.58%
PLASTIC AND RUBBER	-70,777	-6.40%
PYROTECHNIC PRODUCTS	-124	-14.80%
SALT, SULPHUR, EARTH, STONE, PLASTER, LIME, CEMENT	5,318	3.41%
SEEDS, BEANS, CEREALS, SPICES AND FLOUR	6,722	0.84%
SHELLFISH	2,847	29.09%
SPORTING GOODS	-375	-1.42%
TANNING / DYEING EXTRACTS, PAINTS, VARNISHES	12	0.02%
TEA AND COFFEE	320	2.80%
TEXTILES, APPAREL AND ACCESSORIES	57,780	10.48%
TILE, STONE AND GLASS	4,326	5.50%
TOBACCO	-5,129	-24.99%
TOOLS AND CUTLERY (HOME AND INDUSTRIAL)	1,142	6.41%
TOYS AND GAMES	9,764	14.62%
VEGETABLES	-1,926	-1.54%
VEHICLES AND TRANSPORTATION EQUIPMENT	89,198	11.22%
WASTEPAPER	-164,906	-13.51%
WOOD, CORK, STRAW AND OTHER	144,016	24.96%
WOODPULP AND OTHER PULP	-27,320	-6.17%

## Trucking Driver Shortage

The US is caught up in a driver hiring crisis at the start of 2018. At its worst point, the US was nearly 250,000 drivers short of where it needed to be to support the nation's supply chain in 2017. Ten US cities are currently suffering delays of at least one week in moving goods.

"Hiring activity is going to be unable to keep up with the number of drivers required to move goods around the country in 2018, something has to give to bring trained drivers back to this industry and this will probably involve sharing the extra cost

among those who need the supply chain," says Pedersen.

"There are key issues here that need to be discussed among all interested parties to find a way to overcome or reverse the current trend before it starts to hurt US business," he adds.

### Key barriers include:

- Diminishing driver workforce
- Limited availability of specialty drivers
- Strained infrastructure causing congestion
- Tightening truck regulatory requirements
- Growing operational costs for Trucking companies
- Fuel prices spike after hurricane season last year



# Canada Trade Report

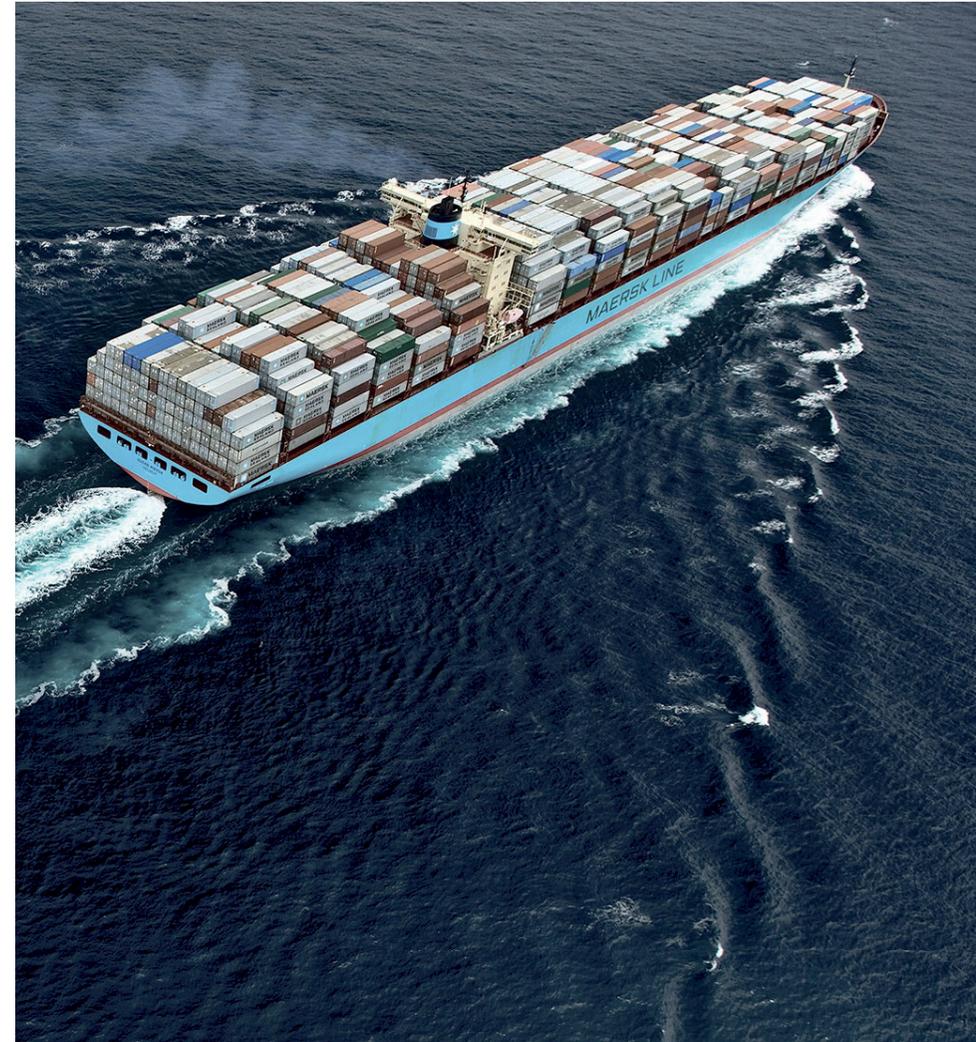
Canada is facing another strong year of growth and with another soon-to-be-signed accord has a rare opportunity to become one of the fastest growing markets across the Americas this year.

“Canada is set to be one of the fastest growing major markets in the Americas in 2018,” says Omar Shamsie, President for Maersk Line North America. “The country’s total trade growth is likely to outpace the US and Colombia but will be in a tight race with Mexico to finish first this year,” he adds.

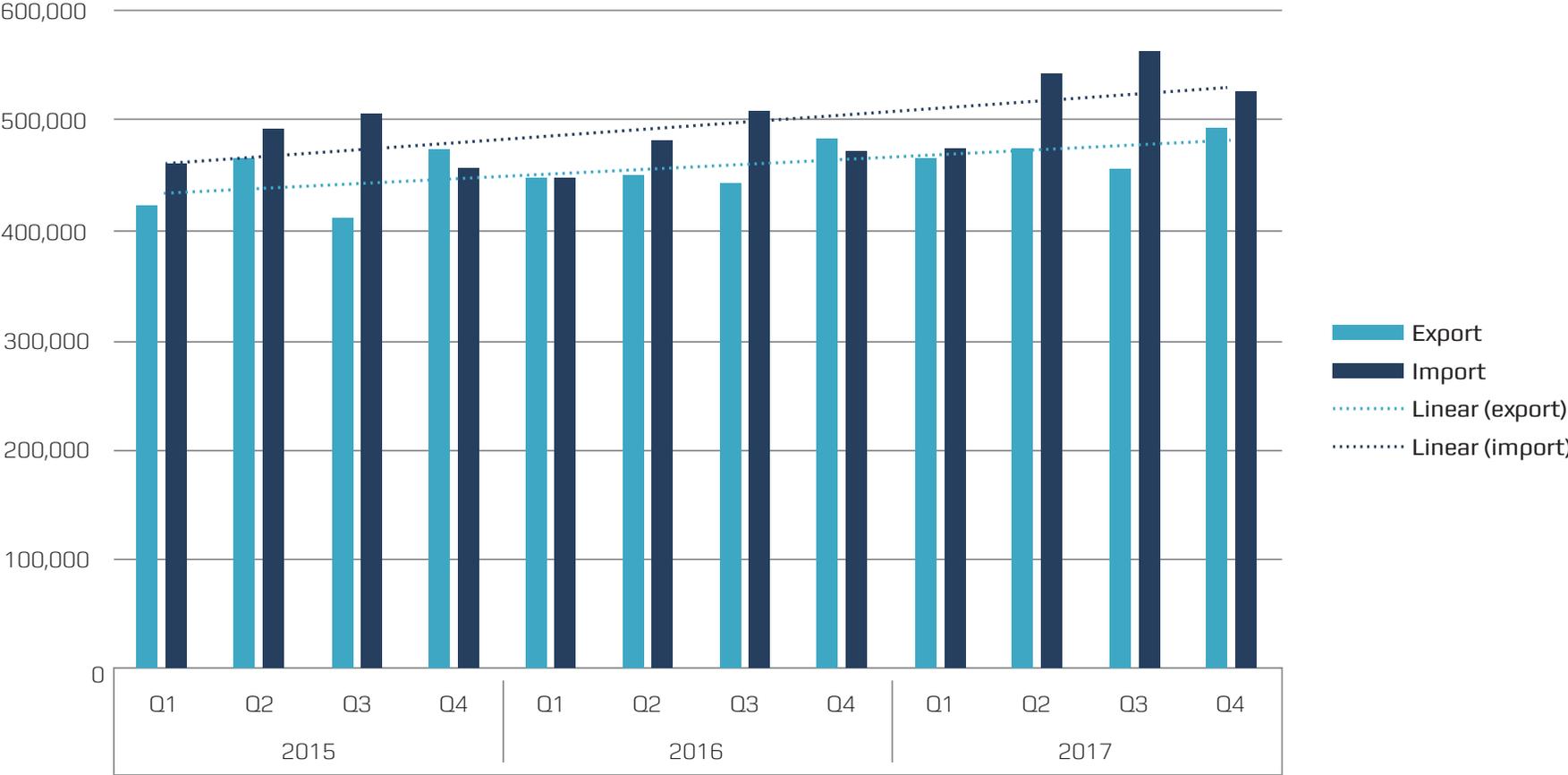
Canada is set to gain from a boost in trade after the country signs the CPTPP (Comprehensive and Progressive Agreement for Trans-Pacific Partnership) free trade area accord with 11 nations across the Pacific. This comes at the same time as the nation benefits from its first full year of free trade with the European Union via the CETA (The Comprehensive Economic and

Trade Agreement) accord. The agreements are expected to contribute to expectations that Canada will deliver more than 7% in maritime container volume growth in 2018, according to Maersk Line’s forecasts.

“For a country that makes trade one of their top priorities and believes that commerce brings prosperity and growth, CPTPP represents an opportunity to help boost exports after a moderately better performance in 2017. CPTPP will also further increase Canada’s attractiveness as a gateway for trade to North America,” says Jack Mahoney, President of Maersk Line Canada. In terms of volumes, Canada’s biggest imports and exports market is Asia, representing 69% of all trade with Northern Europe at 15%, the Mediterranean 8% and the Middle East, India and Pakistan at 5%.



# Canada Trade Between 2015 and 2017 in TEUs



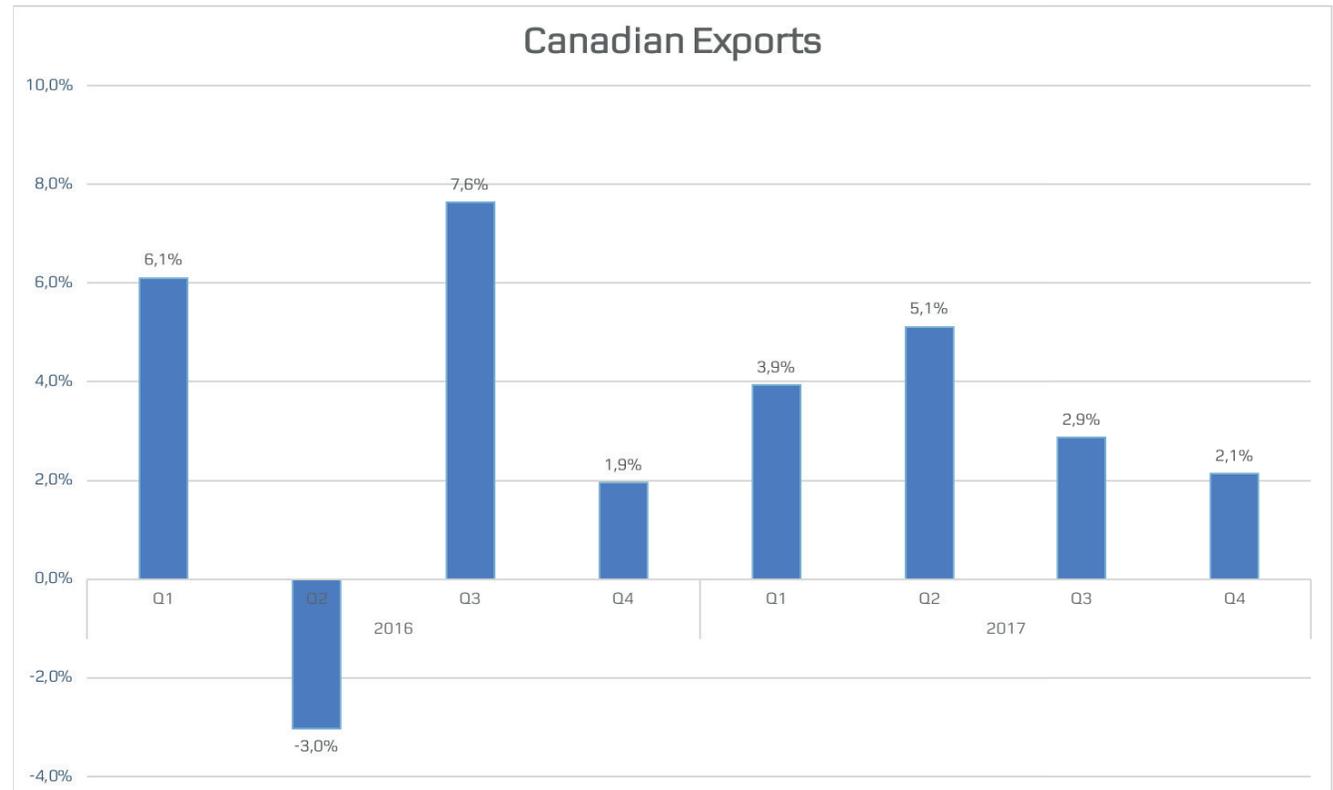
## CANADA CONTAINERIZED TRADE FROM 2015 TO 2017

Sum of TEU Year	QUARTER	EXPORT	IMPORT	Grand Total
2015	Q1	423,053	460,503	883,557
	Q2	465,471	493,576	959,047
	Q3	411,725	506,296	918,021
	Q4	473,949	455,400	929,349
2016	Q1	448,870	449,100	897,971
	Q2	451,380	482,183	933,563
	Q3	443,176	509,156	952,332
	Q4	483,183	472,218	955,401
2017	Q1	466,506	475,442	941,948
	Q2	474,473	542,498	1,016,971
	Q3	455,917	563,379	1,019,296
	Q4	493,494	526,227	1,019,721

“We believe the arrival of CPTPP will provide a boost to Canadian trade, but the effect will be gradual as we are seeing with CETA. It takes effort to find new markets and win new customers; however, it provides Canada the opportunity to strengthen its trade across the Pacific.” he adds. In 2017, Canadian imports increased 13% and exports gained 2%.

Breaking down Canadian exports by seven trade routes, volumes to the Pacific slightly increased 0.3% and 0.3% in the third and fourth quarters, while Oceania (Australia and New Zealand) was 3.5% up by the fourth quarter. Volumes to the Middle East, India and Pakistan had jumped 21% in the second quarter before showing a modest 3% growth in the third and a decline of 16% in the fourth. Europe continued positively throughout the year, with a high of 11.9% in the second quarter and rounding out the fourth quarter with 5.1% growth.

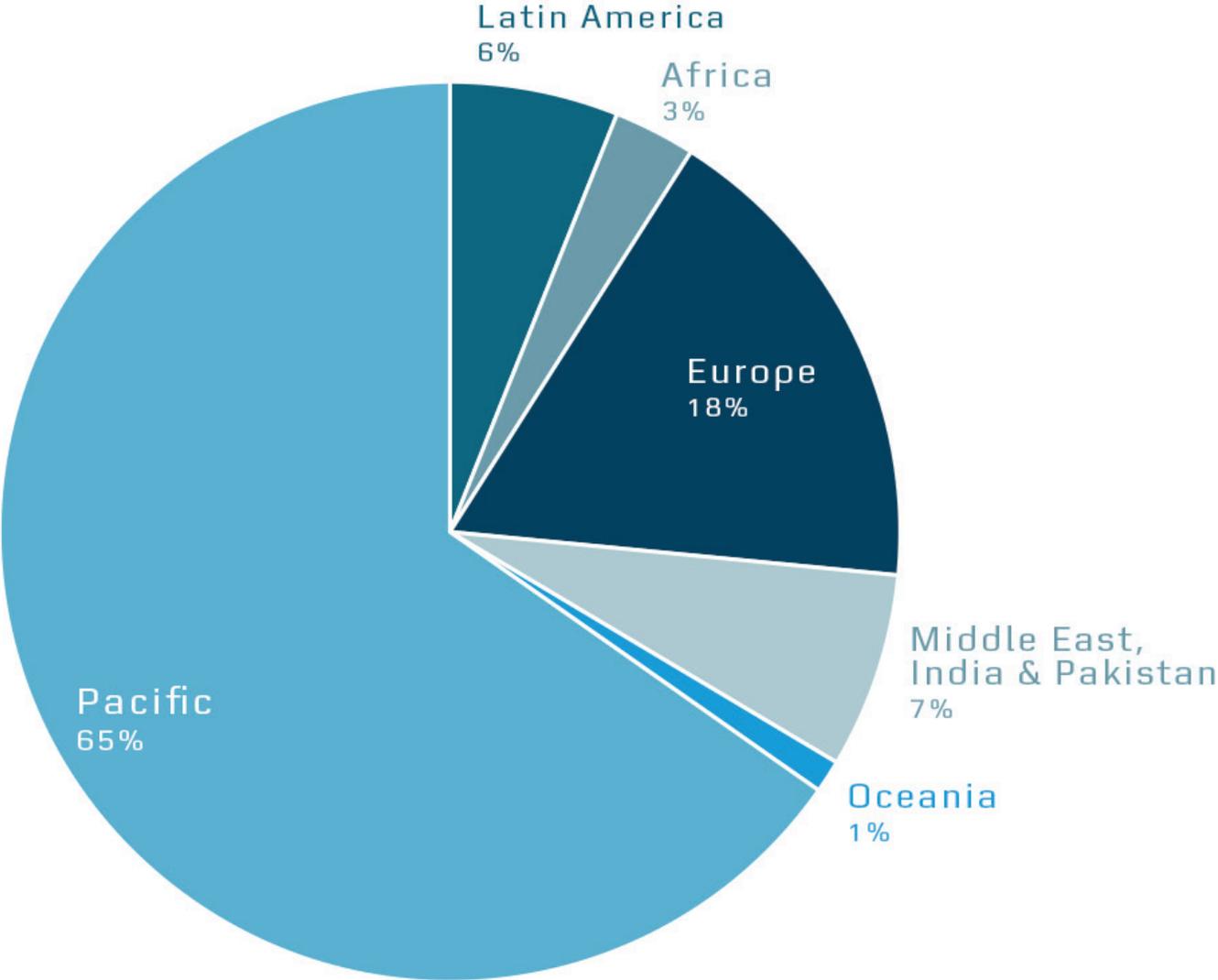
The CPTPP accord involves eliminating more than 98% of tariffs across 11 countries



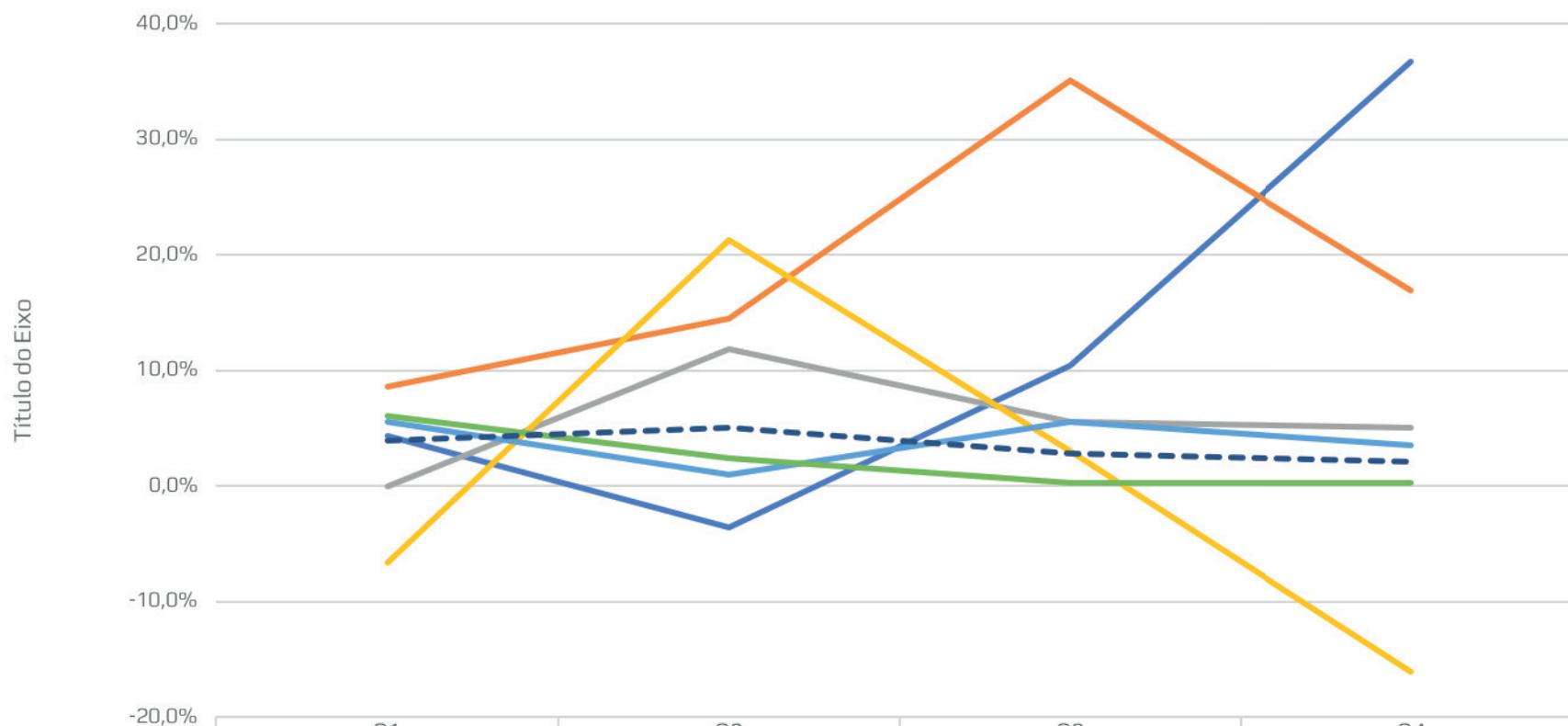
including Japan, Chile, Australia, Malaysia, Singapore and Vietnam, or 15.8% of world GDP. “The signing of the CPTPP accord is important as the Canadian economy is expected to grow more than 2% versus 3.1% in 2017. It will provide new opportunities for agricultural foods, oilseeds and refined canola oil exporters,” says

Mahoney. “We can see demand across more than 100 markets and where certain sectors are doing better than others, helping our clients find new opportunities,” he adds. In terms of refrigerated goods and foods, Canada has an opportunity to increase trade in pork, beef and poultry, for example.

# CANADA CONTAINERIZED VOLUMES BY TRADE LANE



## Canada Export Trade Performance

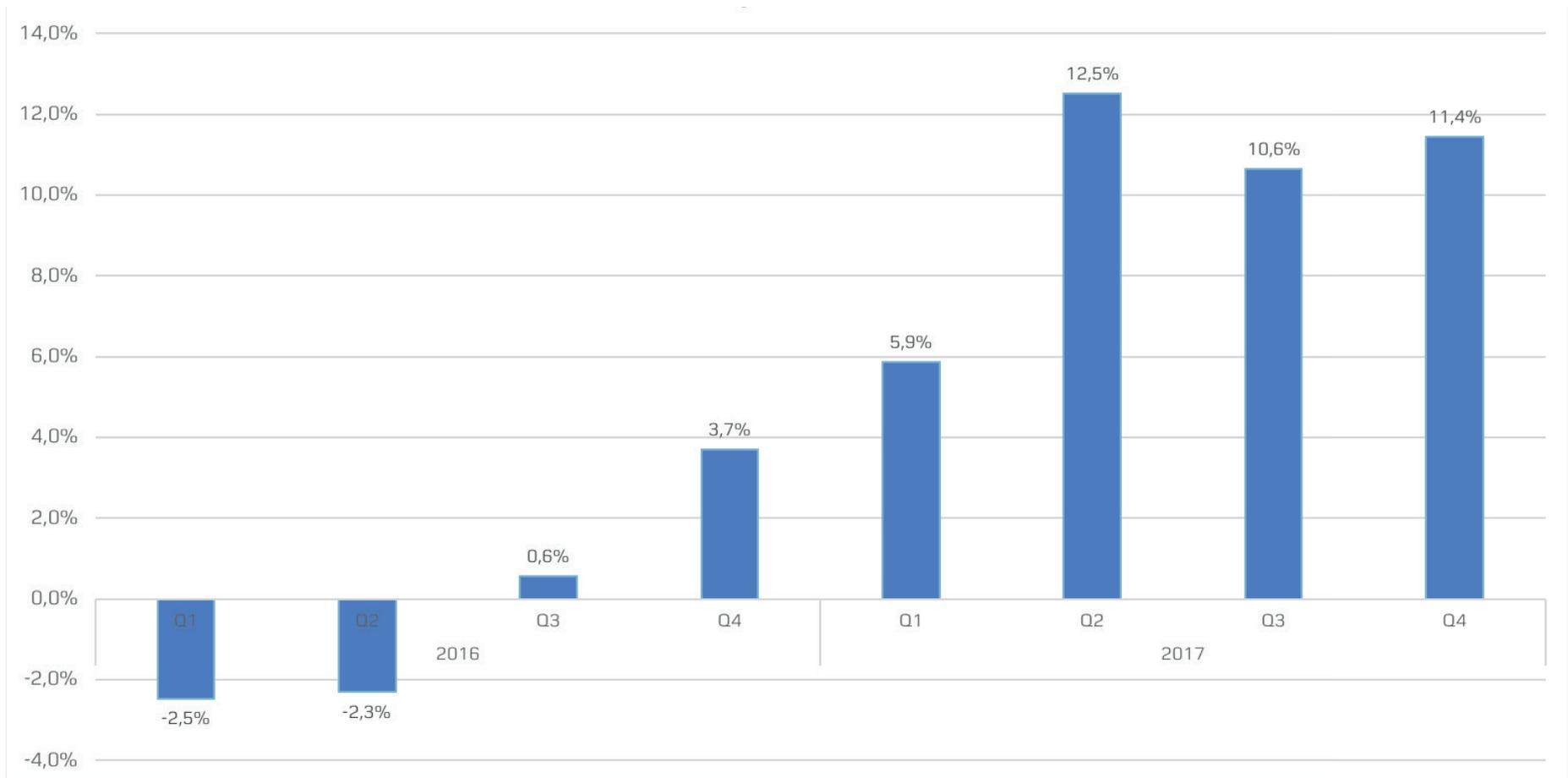


	Q1	Q2	Q3	Q4
LAM	4,3%	-3,6%	10,5%	36,7%
AFR	8,6%	14,6%	35,1%	17,0%
EUR	0,0%	11,9%	5,6%	5,0%
MEIP	-6,7%	21,3%	3,0%	-16,1%
OCE	5,5%	1,0%	5,6%	3,5%
PAC	6,0%	2,4%	0,3%	0,3%
Grand Total	3,93%	5,12%	2,87%	2,13%

# Canada Imports 2018

Canadian imports enjoyed their strongest performance of the year in the fourth quarter in the lead up to Black Friday and Christmas. Indeed, retail enjoyed in 2017 one of its best annual performances in decades supported by strong auto sales too.

## Canadian Imports 2016 - 2017





This comes as Canada is expected to take more business away from the US West Coast in 2018. Prince Rupert benefits from a geographical advantage of being closer to Asia as well as providing more competitive and efficient services than its neighbors further south.

“Prince Rupert is a competitive gateway to the US, a real alternative to its competitors further south. We can see how the Canadian city’s main purpose is geared toward boosting trade backed by a close collaboration between Maersk Line, DP World, the Port Authority of Prince Rupert, and CN Railroad,” says Mahoney. According to the Association of American Railroads, US railways grew 3.7% in the first 40 weeks of 2017 versus Canadian railways growth of 11%.

“Long Beach / Los Angeles remains the top container port in the region but congestion related to rail, trucking and other variables are impeding it from competing as effectively as it could be.”

“This is important because shipping lines need to be focused on efficiency for their clients and make it easier for them to do business in Canada and abroad by stripping out the complexity of what can be a cumbersome container booking process if handled poorly.

Through digital tools, clients can make a container booking online in a few minutes today instead of taking hours in 2014,” he adds.



## About Maersk Line

- Maersk Line is the world's largest container shipping company with more than 33,000 employees and 630 plus vessels
- Maersk Line serves customers through 306 offices in 114 countries.

## About A.P. Moller-Maersk

- The first Maersk vessel to arrive in North America was the Laura Maersk in December 1913 when she docked at Galveston, Texas.
- Maersk has more than 89,000 staff in the world and is present in more than 130 countries.
- Other subsidiaries include Svitser, which operates 430 tugs, Maersk Supply Service runs 70 support ships and Maersk Drilling has 22 vessels.
- Maersk vessels call at a port every 15 minutes.

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US statistics are provided by IHS Markit to Maersk Line and also include Maersk Line data. Canada statistics are produced by Container Trade Statistics as well as port authorities across the country. All forecasts are produced by Maersk Line.

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