

# **THRIVING IN A NEW ERA OF GLOBAL TRADE**

## **TMSA EXECUTIVE SUMMIT 2025**



# I. Disruption is the Default: Why Stability is Gone For Good



**PANAMA CANAL**  
Roughly a million containers will travel through the canal each week (double the current rate) once new lanes for bigger vessels are finished in 2016. The canal authority recently announced it is at least six months behind schedule.

**GULF OF ADEN**  
An uptick in piracy has forced boats to speed their way through these waters off Somalia, which costs the shipping industry roughly \$2.7 billion each year in extra fuel (the largest cost of piracy by far).

**KEY**

**WORLD'S LARGEST PORTS (BY CARGO VOLUME PER YEAR)**

- 10 MILLION TONS
- 100
- 500

0 1,250 2,500 MILES

**Disruption isn't an event  
anymore – it's the operating  
environment.**

# Black Swan

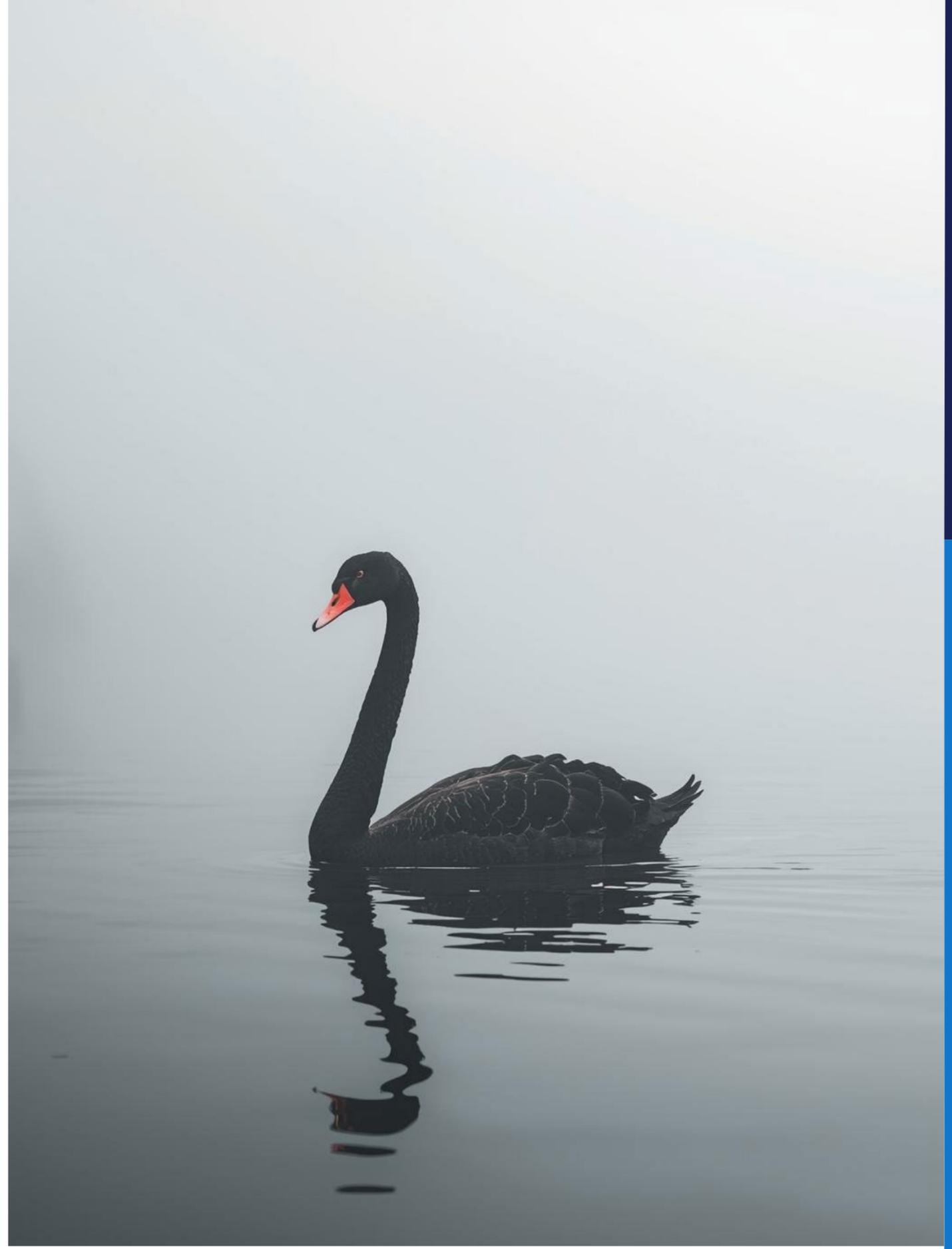
**Have a Significant Impact on the World**

**And are Characterized by**

**1. Rarity**

**2. Extreme Impact**

**3. Retrospective Predictability**





# CURRENT ERA | TARIFF ESCALATION

**October 10**  
IEEPA  
Retaliation:  
100%  
additional  
tariff on all  
Chinese goods

**August 1**  
Section 232:  
Copper tariff  
(50%)

**April 2**  
IEEPA  
“Liberation  
Day”: 10%  
baseline tariff  
on all imports,  
de minimis

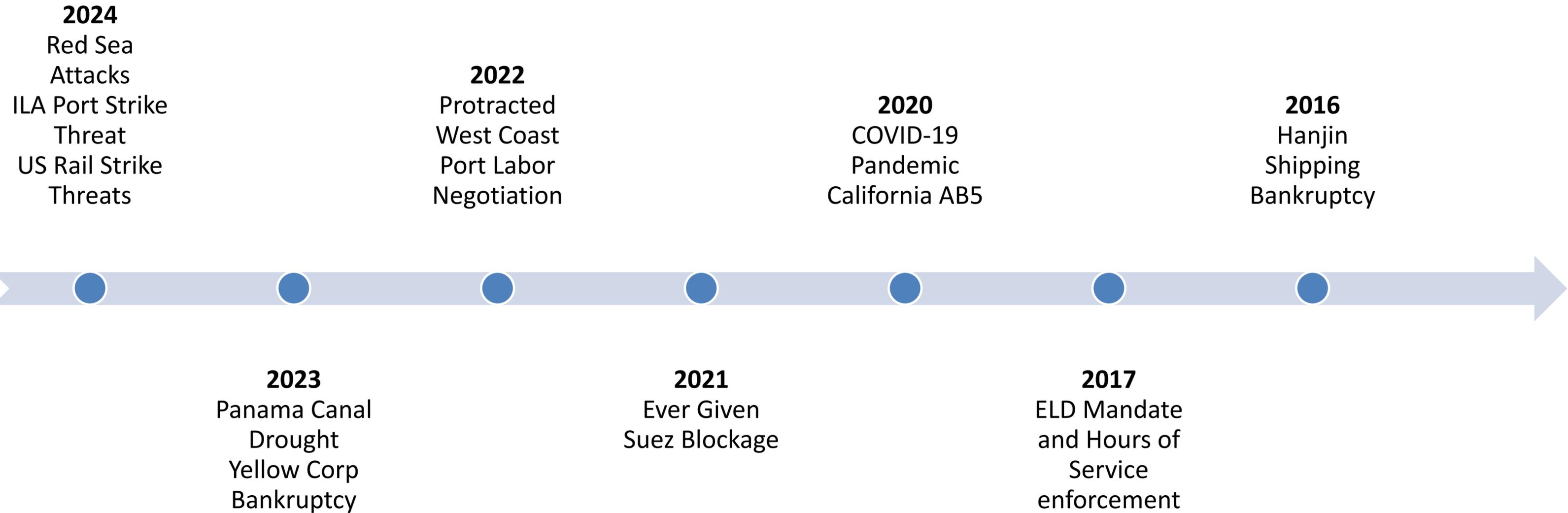
**January 20**  
IEEPA  
authorized  
through  
declaration of  
National  
Emergency

**September 26**  
Section 232 +  
IEEPA:  
pharma,  
furniture,  
trucks

**June 4**  
Section 232:  
Steel &  
aluminum  
tariffs doubled  
to 50%

**February 1**  
IEEPA + NEA:  
25% tariffs on  
Mexico and  
Canada, 10%  
additional on  
China

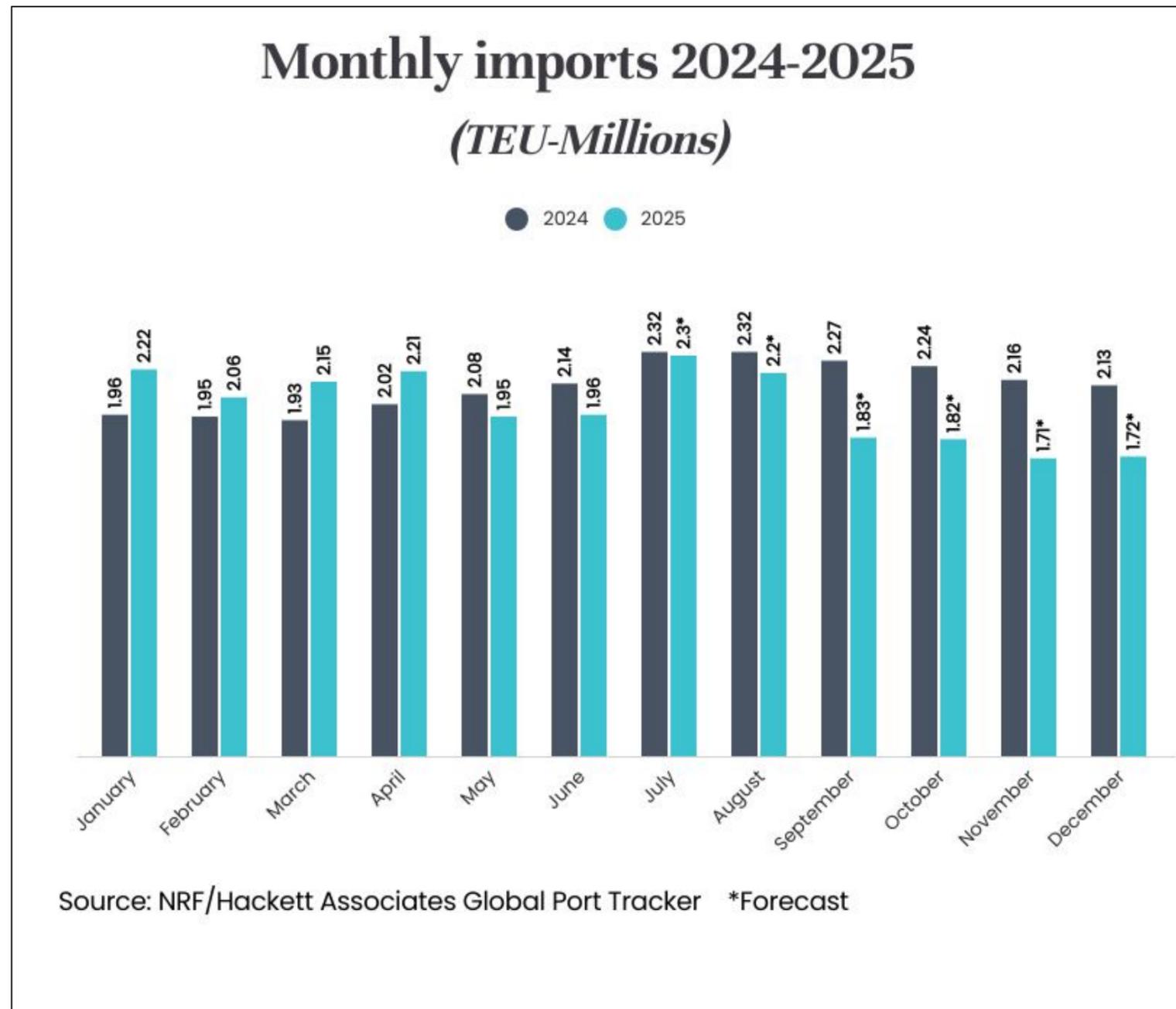
# CURRENT ERA | RECENT VOLATILITY







# NRF FORECAST | IMPORTS CRASH



"The uncertainty of U.S. trade policy is making it impossible to make the long-term plans that are critical to future business success. These tariffs and disruptions to the supply chain are adding costs that will ultimately lead to higher prices for American consumers." - **Jonathan Gold, VP for Supply Chain and Customs Policy, National Retail Federation (NRF)**

# MULTI DIMENSIONAL DISRUPTION



# MULTI DIMENSIONAL DISRUPTION





**What's one resilience tactic your company has implemented that you're proud of?**

# II. The Macroeconomic Reset: What's Driving Global Trade in 2025



ROUGHLY 10% OF THE WORLD'S CARGO VOLUME (BY TONNAGE) IS CARRIED THROUGH THE PANAMA CANAL (PUBLICLY TRADED AT THE CURRENT RATE) ONCE NEW LANES FOR BIGGER VESSELS ARE FINISHED IN 2016. THE CANAL AUTHORITY RECENTLY ANNOUNCED IT IS AT LEAST SIX MONTHS BEHIND SCHEDULE.

## KEY

WORLD'S LARGEST PORTS (BY CARGO VOLUME PER YEAR)

• 10 MILLION TONS

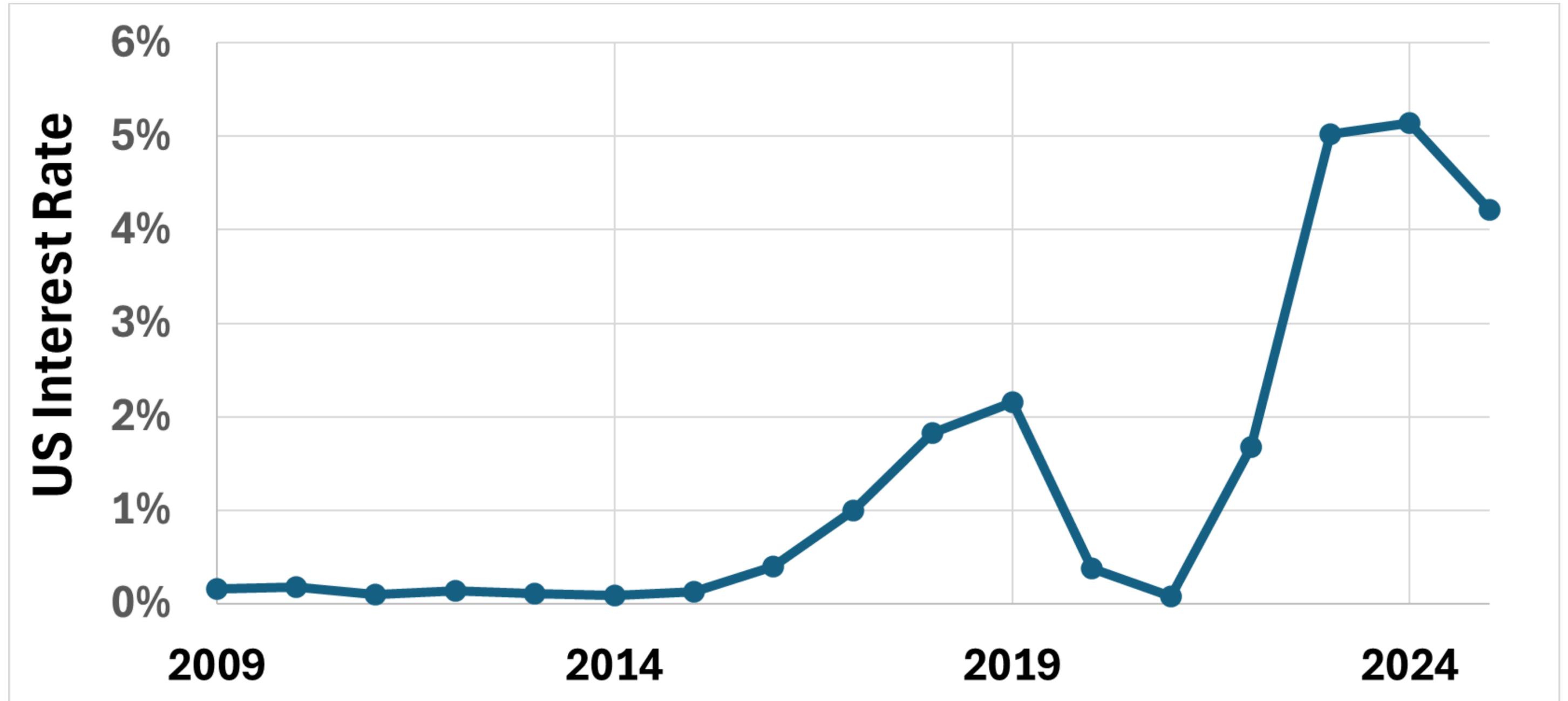
● 100

● 500

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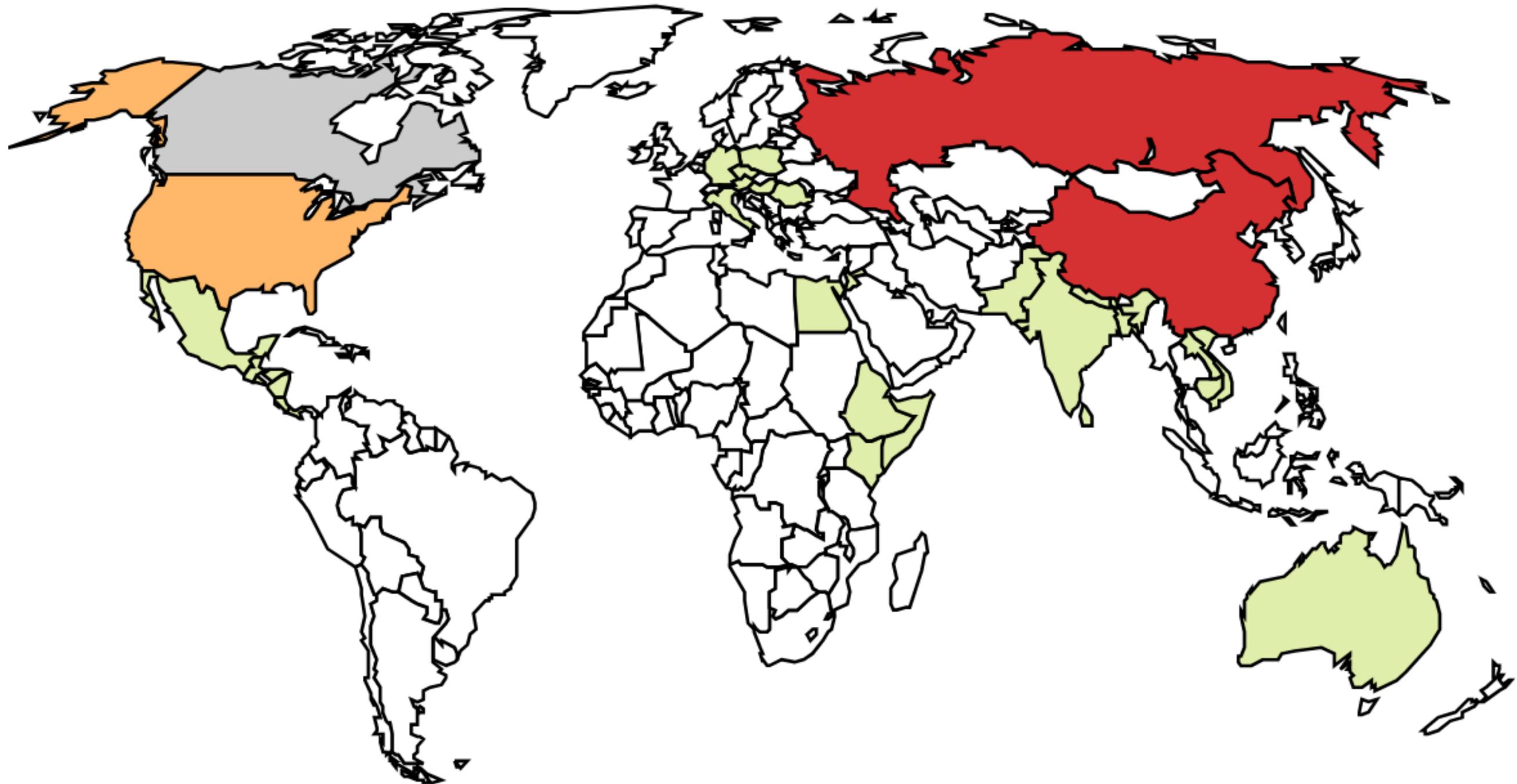
# CAPITAL IS EXPENSIVE AGAIN



# EXPENSIVE CAPITAL RESHAPES LOGISTICS



# GLOBAL SOURCING IS FRAGMENTING

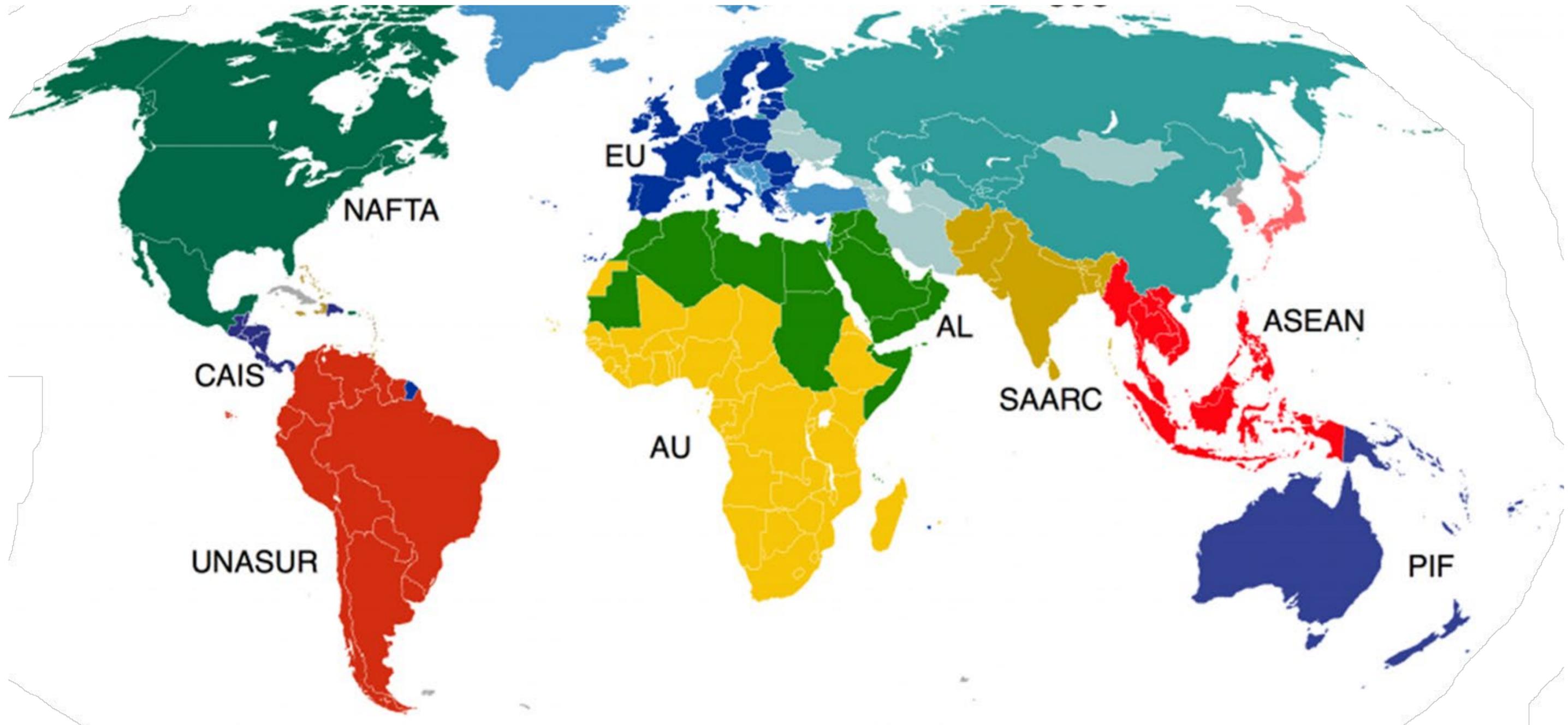


# ENERGY, EMISSIONS, AND COST



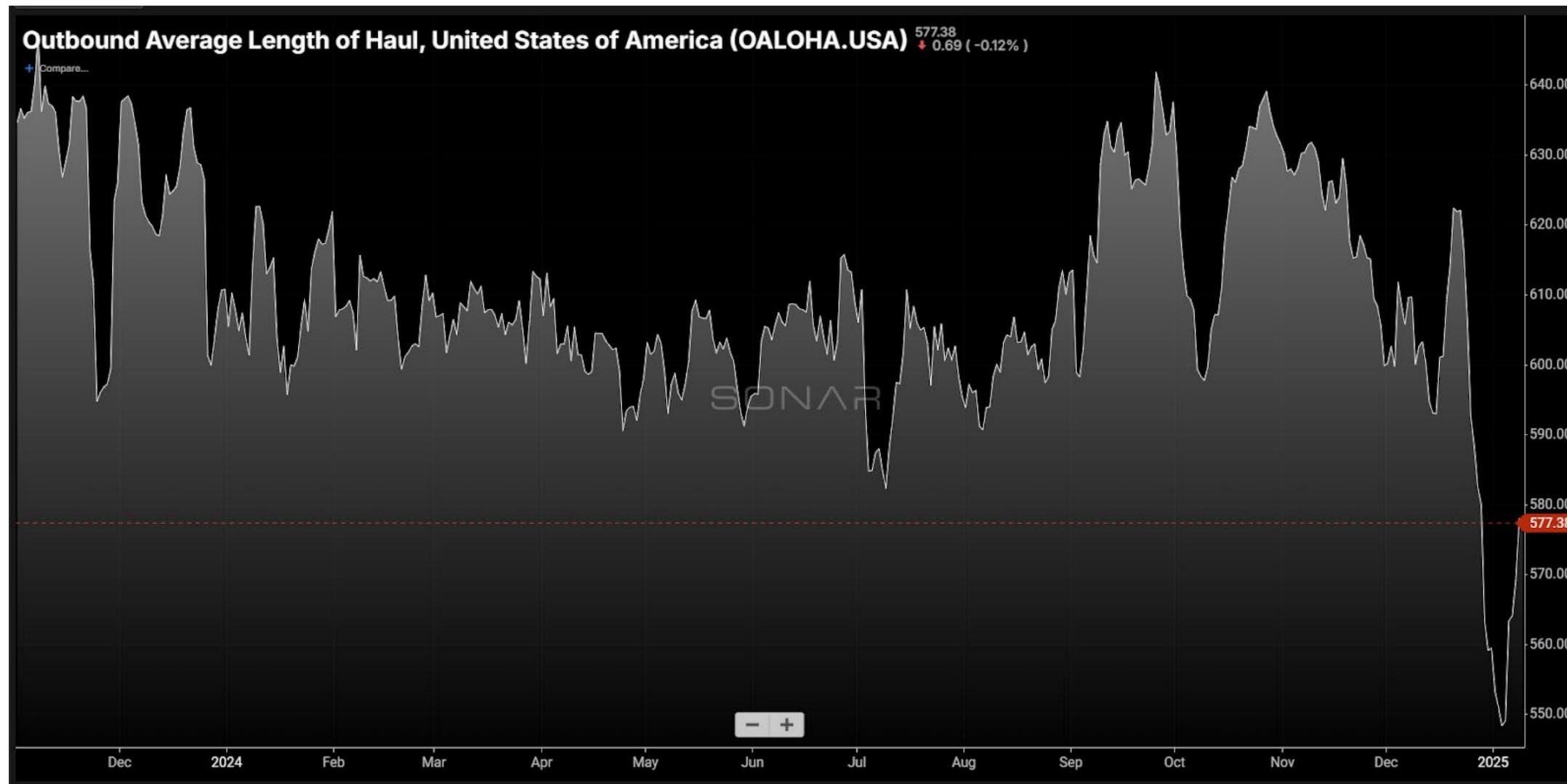
Source: S&P Global Platts

# TRADE POLICY IS FRAGMENTING





# FREIGHT ECONOMY | DEMAND CHANGES



The information suggests the shrinking load lengths are being driven by simultaneous growth in demand for loads moving lower than 100 miles and shrinking demand for loads moving greater than 450 miles



**What's one change your company  
has made to help you see the forest  
and the trees?**

# III. Shipper Expectations have Changed: The Dilemma of Price and Partnership



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# PURCHASER PRIORITIES

"I seek operational excellence. I'm looking for evidence that the provider executes day-to-day operational details accurately and on time."

**Ops Excellence - 24%**

"Within my industry, there are unique logistics requirements. I need a logistics partner that understands the challenges of storing, managing and delivering my products."

**Industry - 21%**

"I want innovative ideas. I need a partner that provides regular recommendations on how to improve logistics operations."

**Innovation - 9%**

**Flexibility - 23%**

"My company's logistics requirements are constantly changing. I need a logistics partner that is flexible and can help me adapt quickly to the demands of the business."

**Cost - 17%**

"I'm under constant pressure to reduce costs. I need a logistics partner who understands that pressure and is constantly thinking about how to do more, for less."

**Technology - 3%**

"The right technology is critically important. I need a partner that leverages the most up-to-date logistics management systems so that I can fully automate and optimize my supply chain."



# PURCHASER PRIORITIES



## TOP CHALLENGES SHIPPERS FACE

Cutting transport costs **32%**

Business process improvement **22%**

Improving customer service **18%**

Supply chain visibility **16%**

Managing inventory **15%**

Reducing labor costs **14%**

Expanding to new markets via selling **11%**

Finding, training, retaining qualified labor **11%**

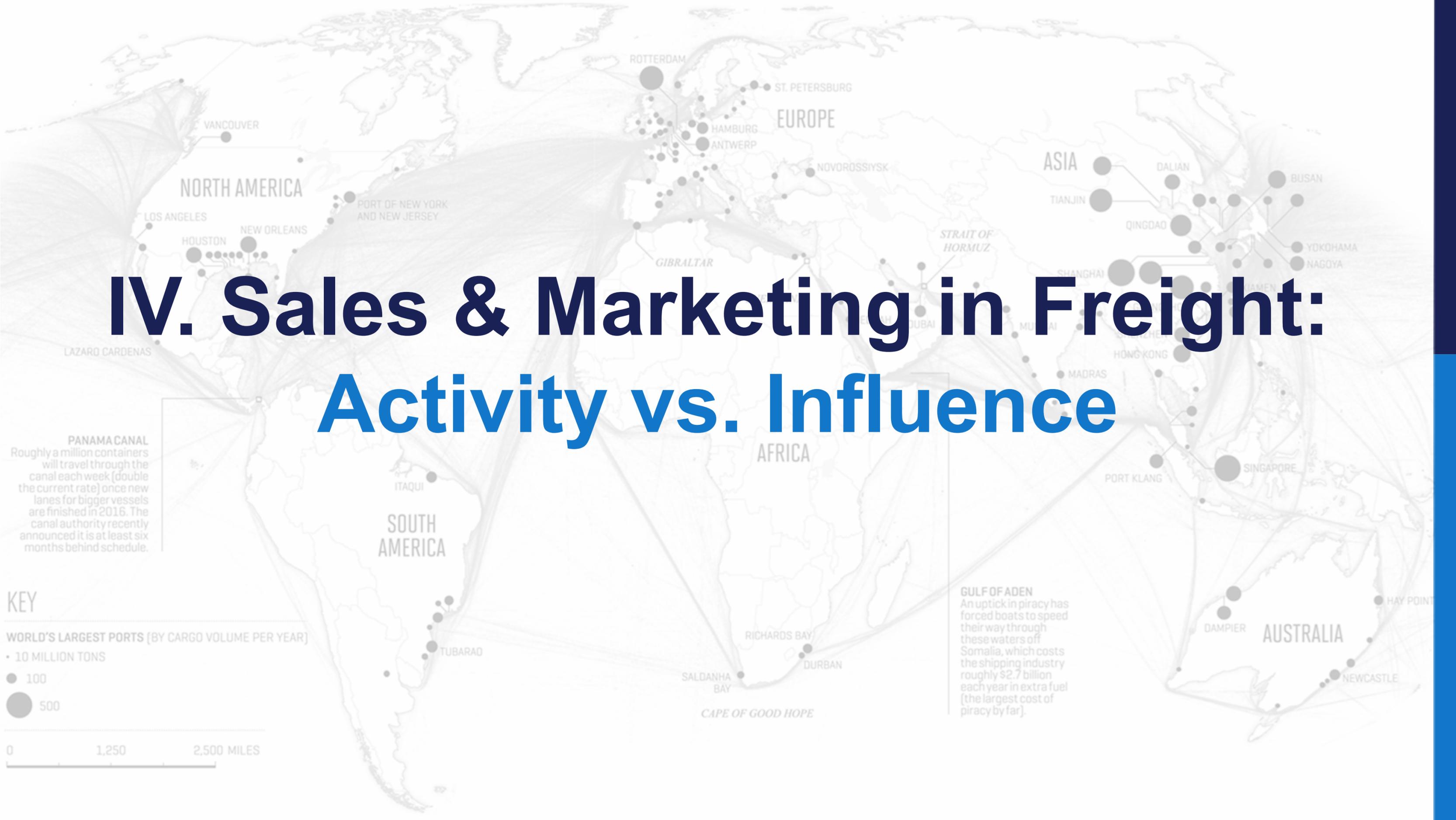
Technology strategy and implementation **10%**





**CONFIDENCE =  
CAPABILITY +  
CULTURE**

# IV. Sales & Marketing in Freight: Activity vs. Influence



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**Activity**



**Insight**



**Influence**



# **SALES SKILLS | WHAT IS IMPORTANT**

**Active Listening**

**Linkage**

**Storytelling**

**Business Acumen**

**Curiosity**

**Coachability**

**Follow-Through**

**Public Speaking**

**Reflection**

**Responsibility**

**Problem-Solving**

**Negotiating**

**Social Selling**

**Networking**

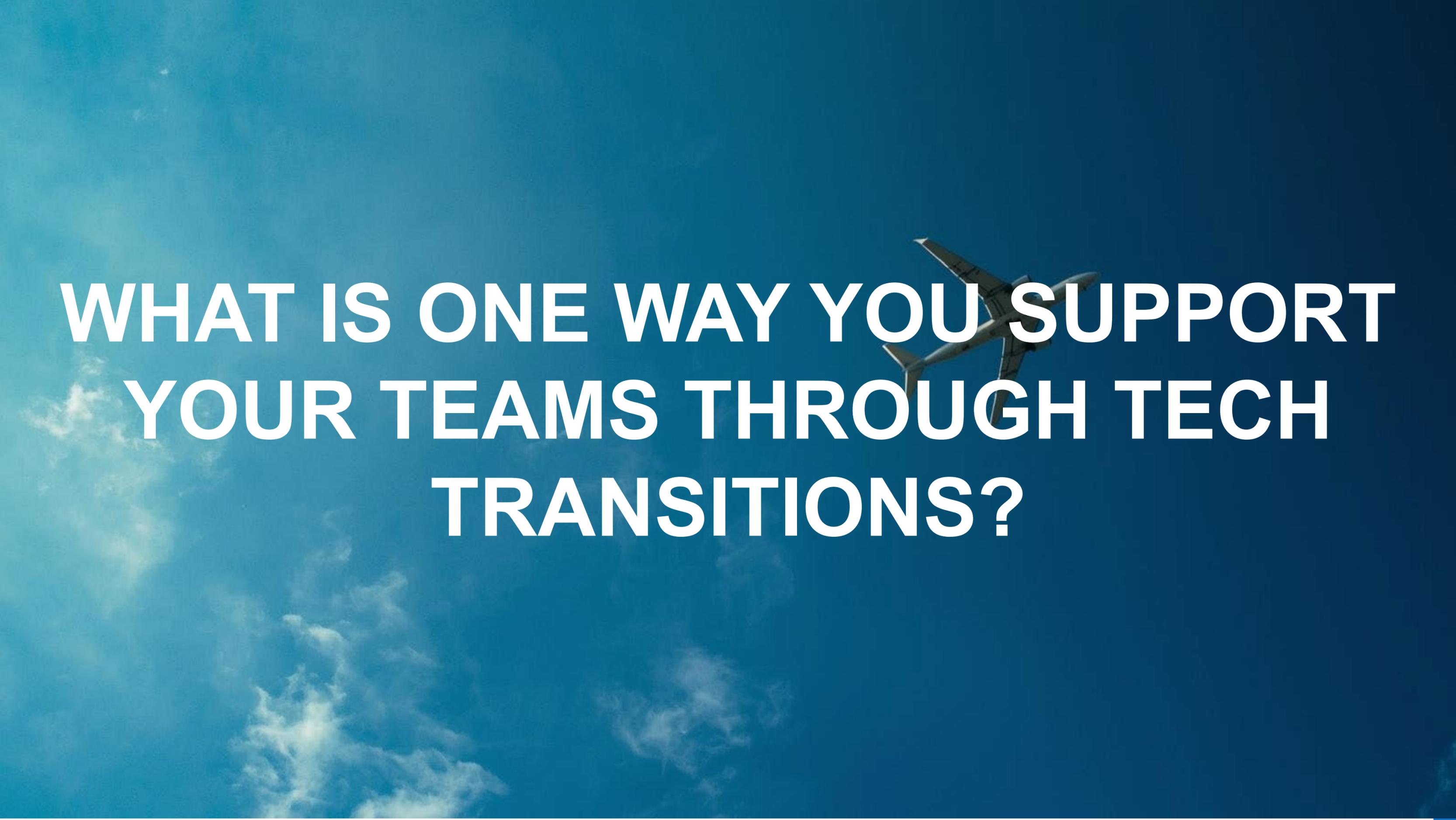
**Industry Knowledge**

# Sales Price

**Basic Information**

**Relationship  
Status**

It's complicated

A commercial airplane is flying in a clear blue sky with some light, wispy white clouds. The plane is positioned in the upper right quadrant of the image, flying towards the left. The overall scene is bright and clear, suggesting a high-altitude flight.

**WHAT IS ONE WAY YOU SUPPORT  
YOUR TEAMS THROUGH TECH  
TRANSITIONS?**

# V. Winning in 2026: Six Clear Steps



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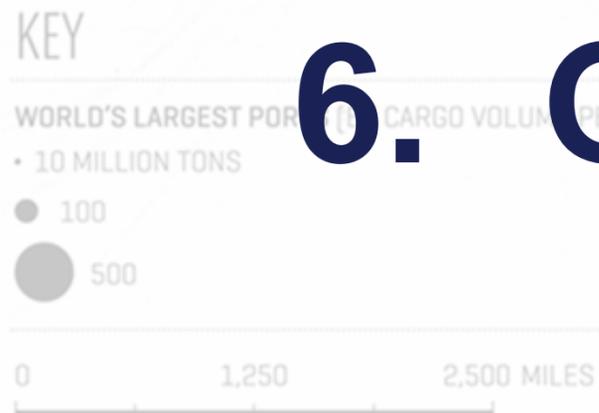


**WE'RE ON A MISSION FROM  
GOD**

- 
- A world map showing shipping routes and port activity. The map is overlaid with a network of lines representing shipping lanes. Callout boxes provide additional information: one for the Panama Canal and another for the Gulf of Aden. The map includes labels for major regions like North America, Europe, Asia, and Australia, and various ports such as Rotterdam, Hamburg, Antwerp, Shanghai, and Singapore. A scale bar at the bottom left indicates distances up to 2,500 miles.
1. Solve for Complexity
  2. Be Frictionless
  3. Build Resilience
  4. Sell Risk Mitigation
  5. Own The Customer Experience
  6. Get Help

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