



# Global Supply Chain Dynamics

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# Organizational Risk Survey

## Top risks to business growth in the next 12-18 months

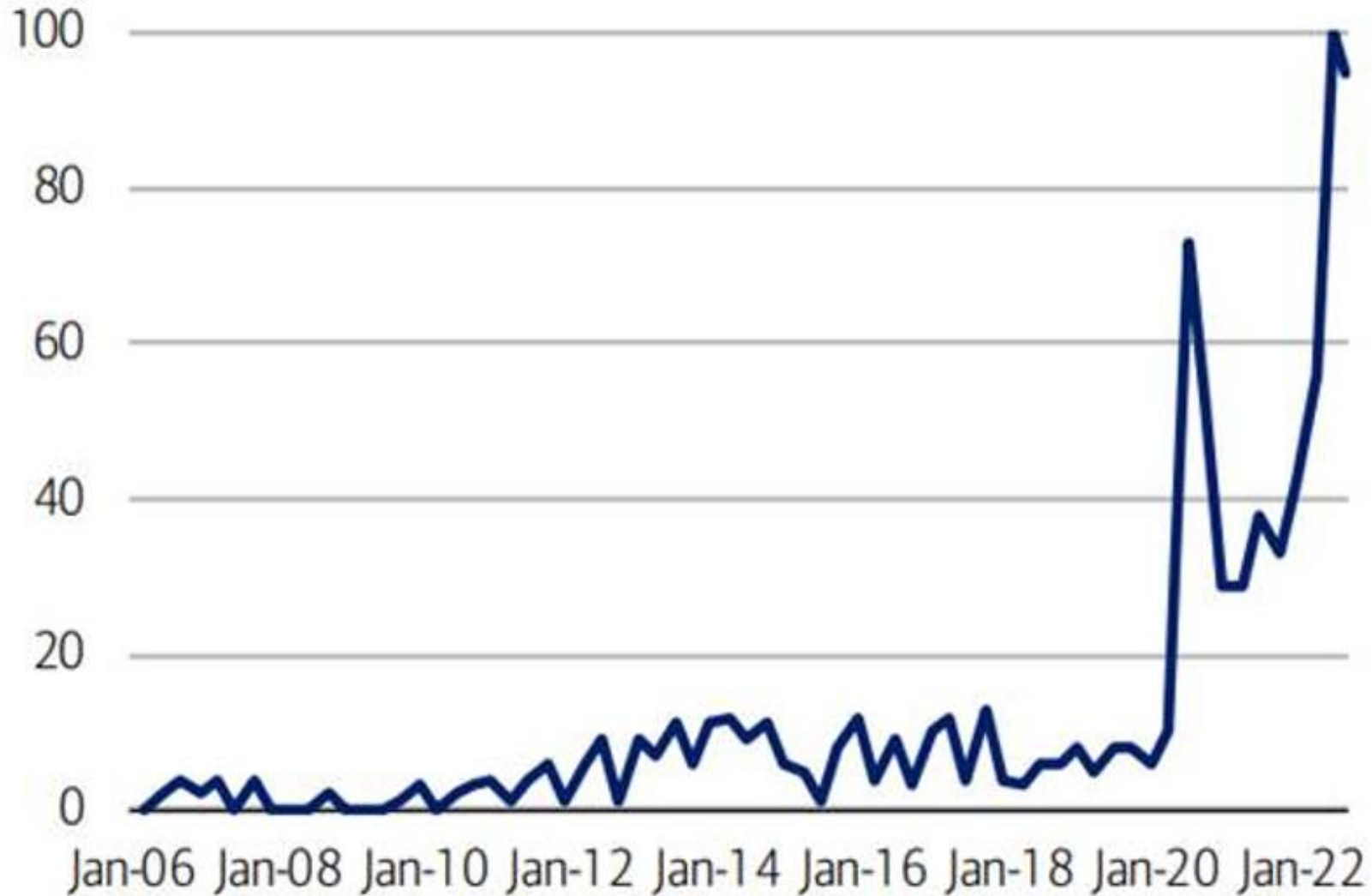


# Global Supply Chain Pressure Index



Source: NY Fed, 2023

# Reshoring Mentions - US Earnings



# Planned US Semiconductor Foundries

Company	Spending	Location
Taiwan Semiconductor	\$12bn	Arizona
Intel	\$20bn	Arizona
Samsung	\$17bn	Texas
Texas Instruments	Up to \$30bn	Texas
Global Foundries	\$1bn	New York
Intel	\$20bn	Ohio
SkyWater Technology	\$2bn	Indiana



# Nearshoring



Company	Industry	Country	Investment
BorgWarner	Automotive		\$47m
Nidec	Electric Motors		\$715m
Tesla	Automotive		\$5b
BMW	Automotive		\$870m
Lennox Intl.	Climate Control		\$150m
Nestle	Food & Beverage		\$340m
GM	Automotive		\$1b

# The Move to Mexico

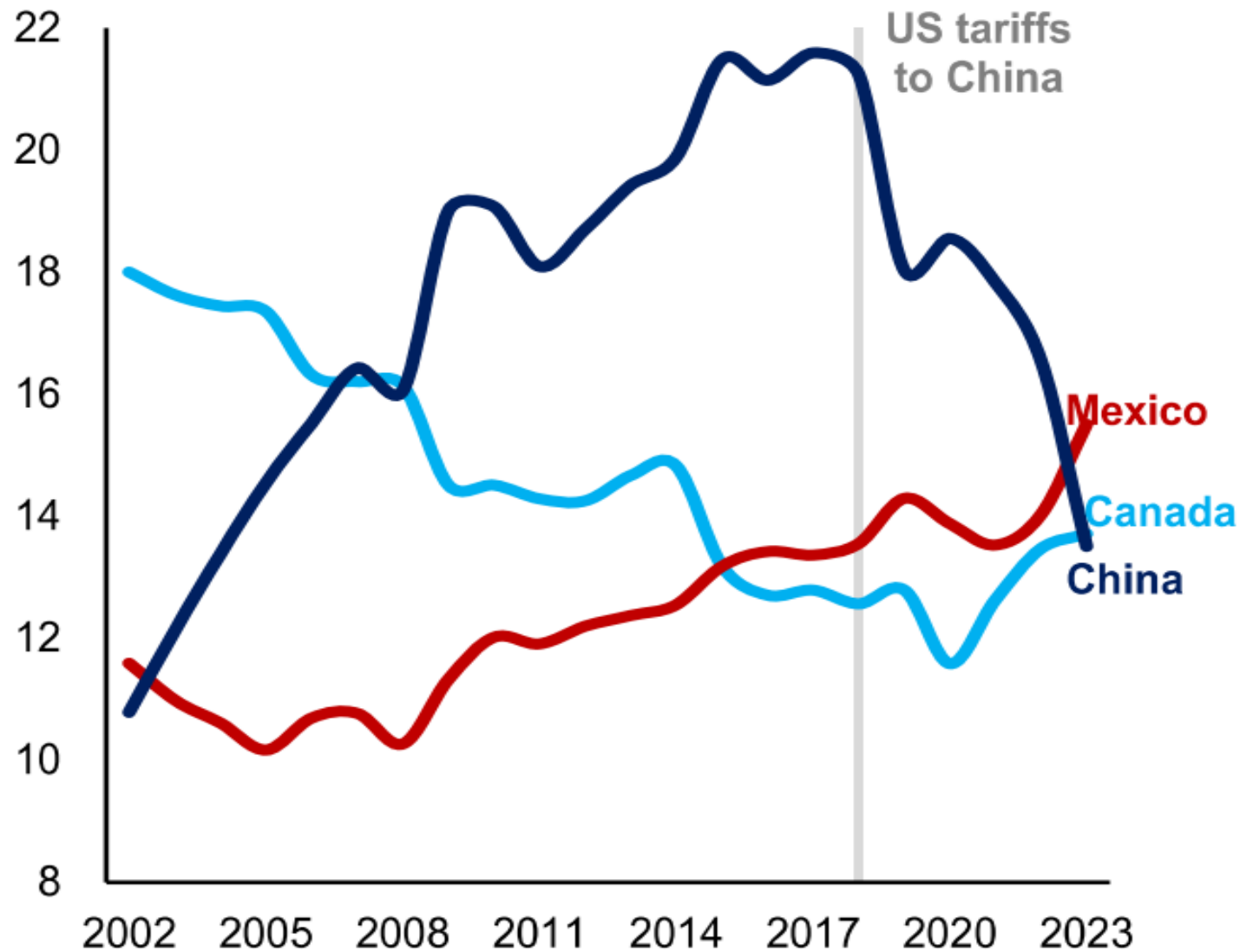
## INFLATION-ADJUSTED MACHINERY\* IMPORTS TO MEXICO

USD bn, monthly, seasonally-adjusted



Source: Prologis Research, Banco de Mexico, US Census Bureau, 6/23

# % Share of Total US Imports





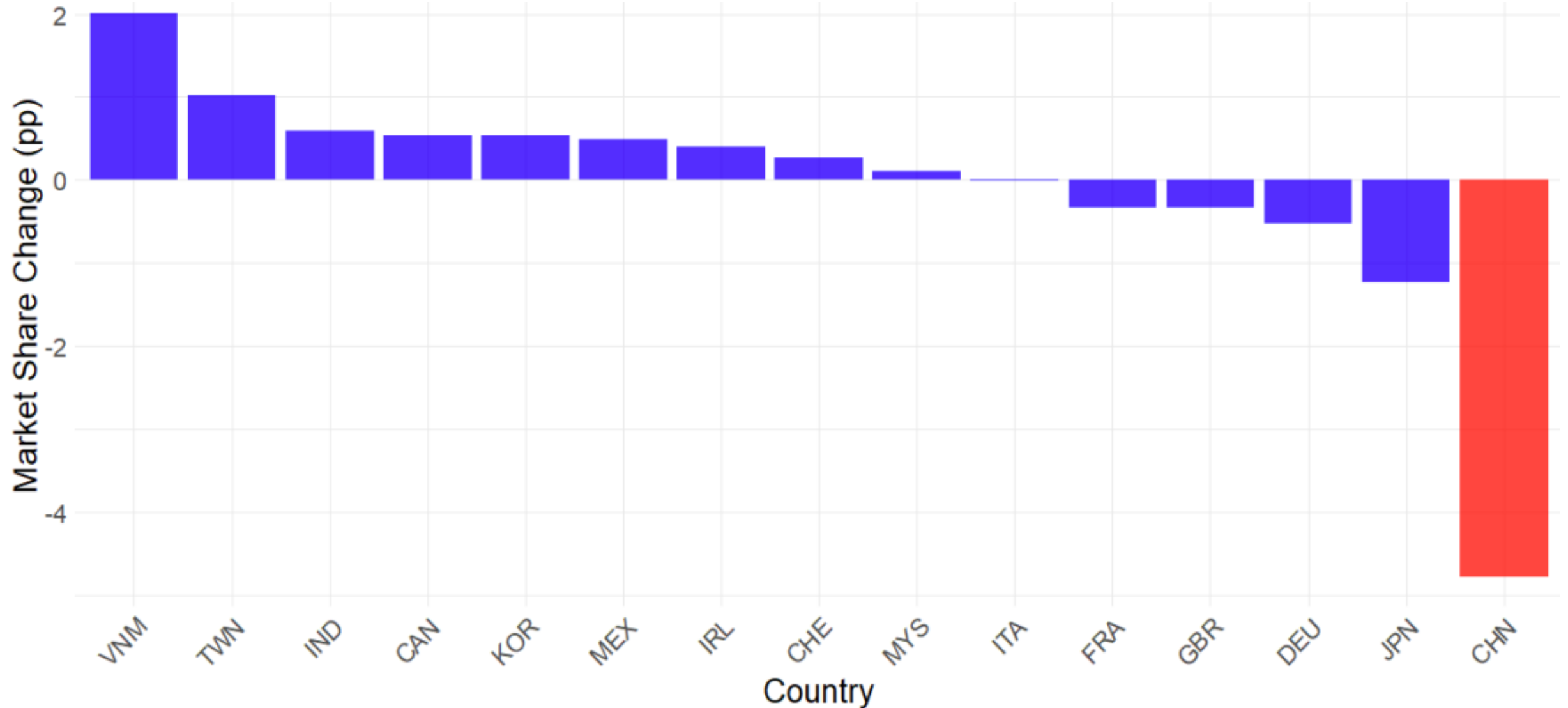
# Transportation Alliances



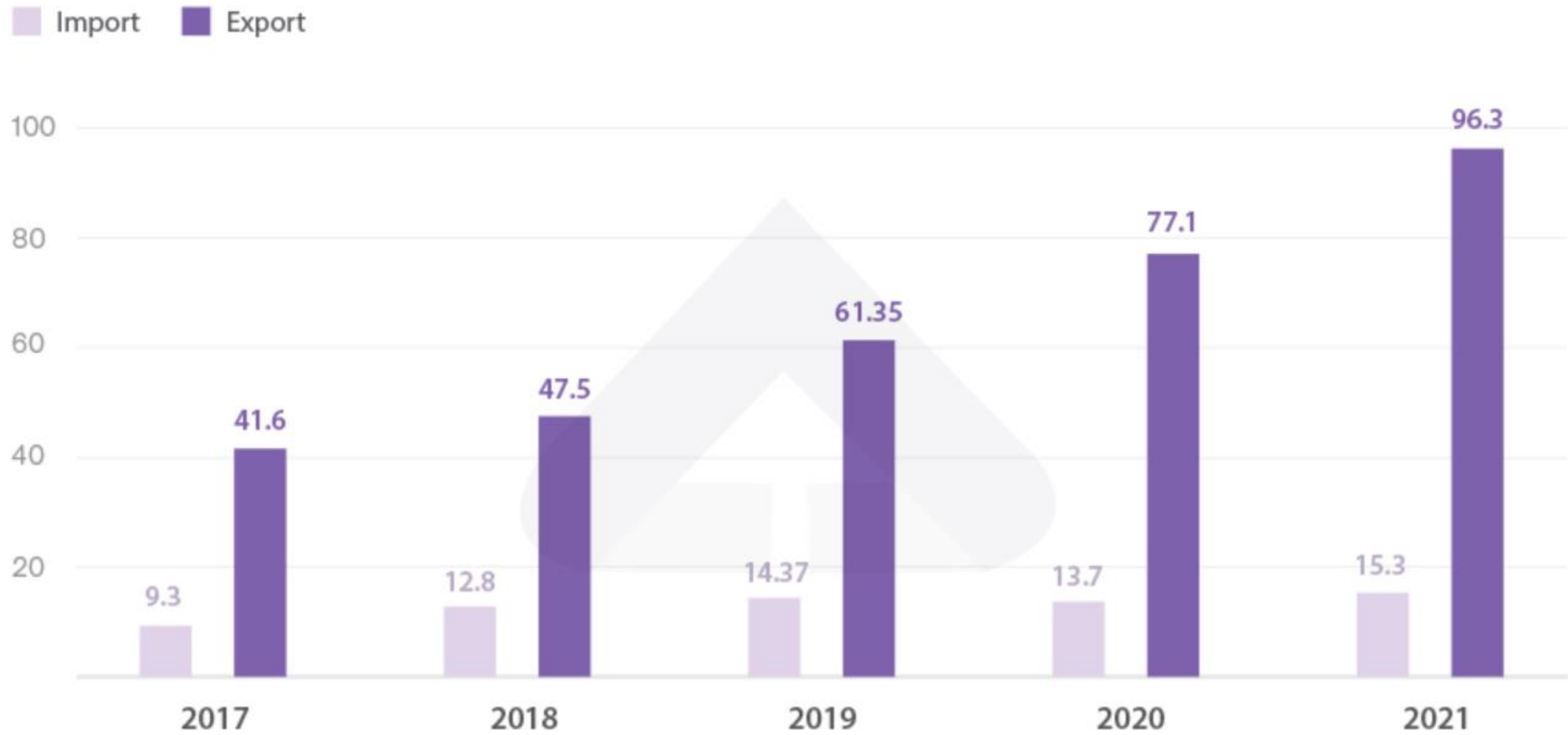
April 2023 – Union Pacific – Canadian National Rail – GrupoMexico

April 2023 – Canadian Pacific Rail – Kansas City Southern – Schneider

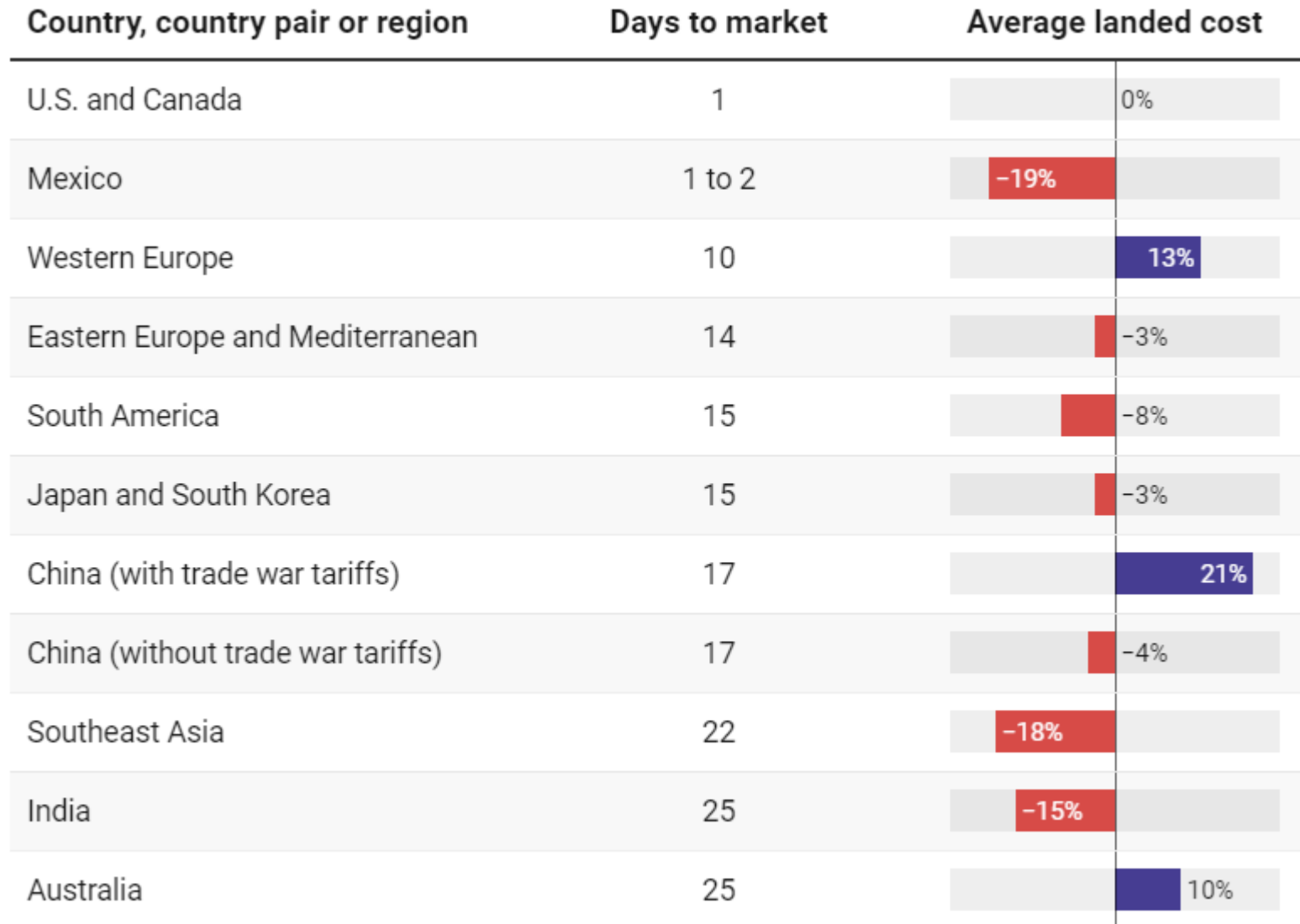
# 2017 – 22 US Import Mkt Share ▲



# Vietnam – US Trade in 2021 (US\$ billion)

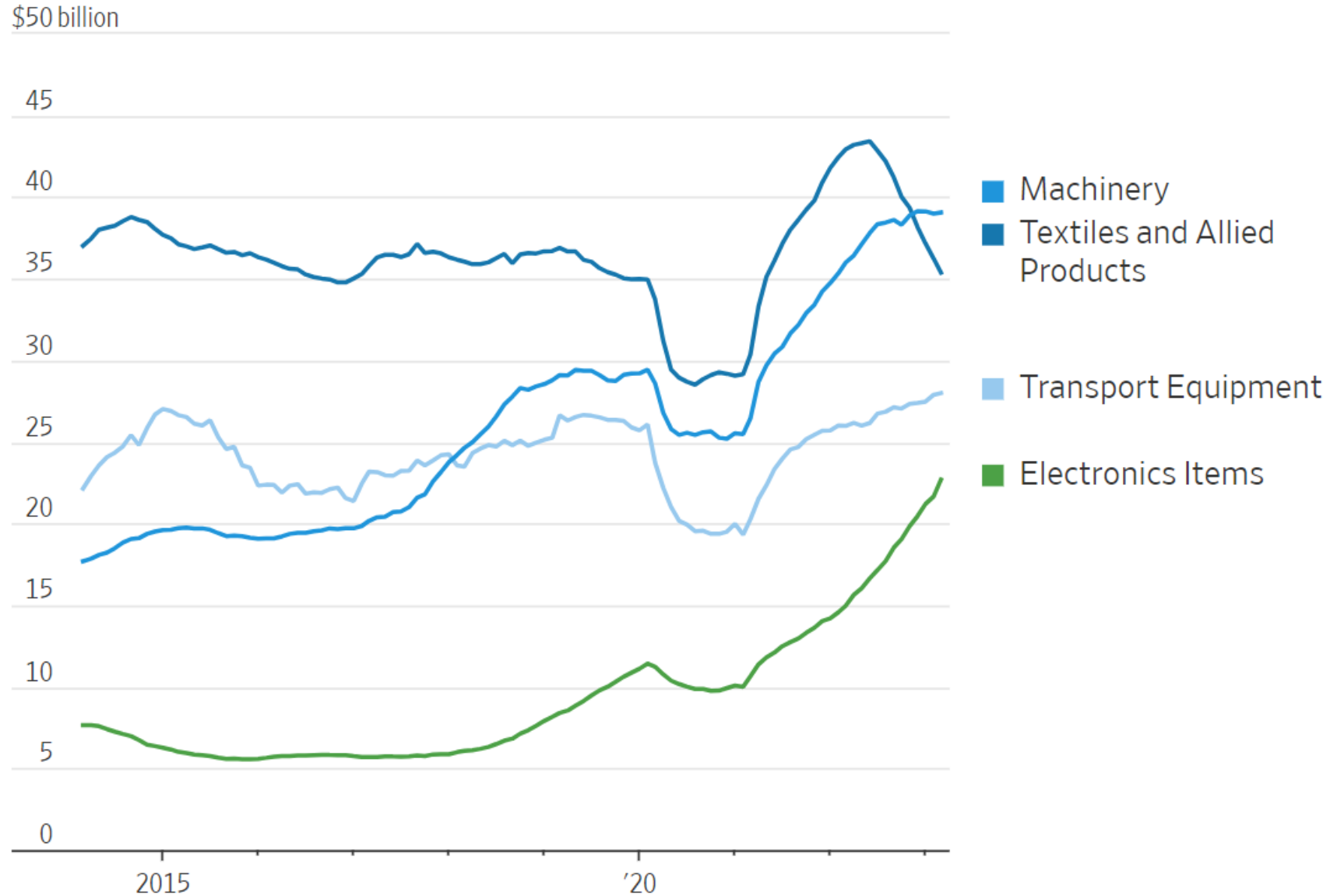


# Global Landed Costs of US Imports

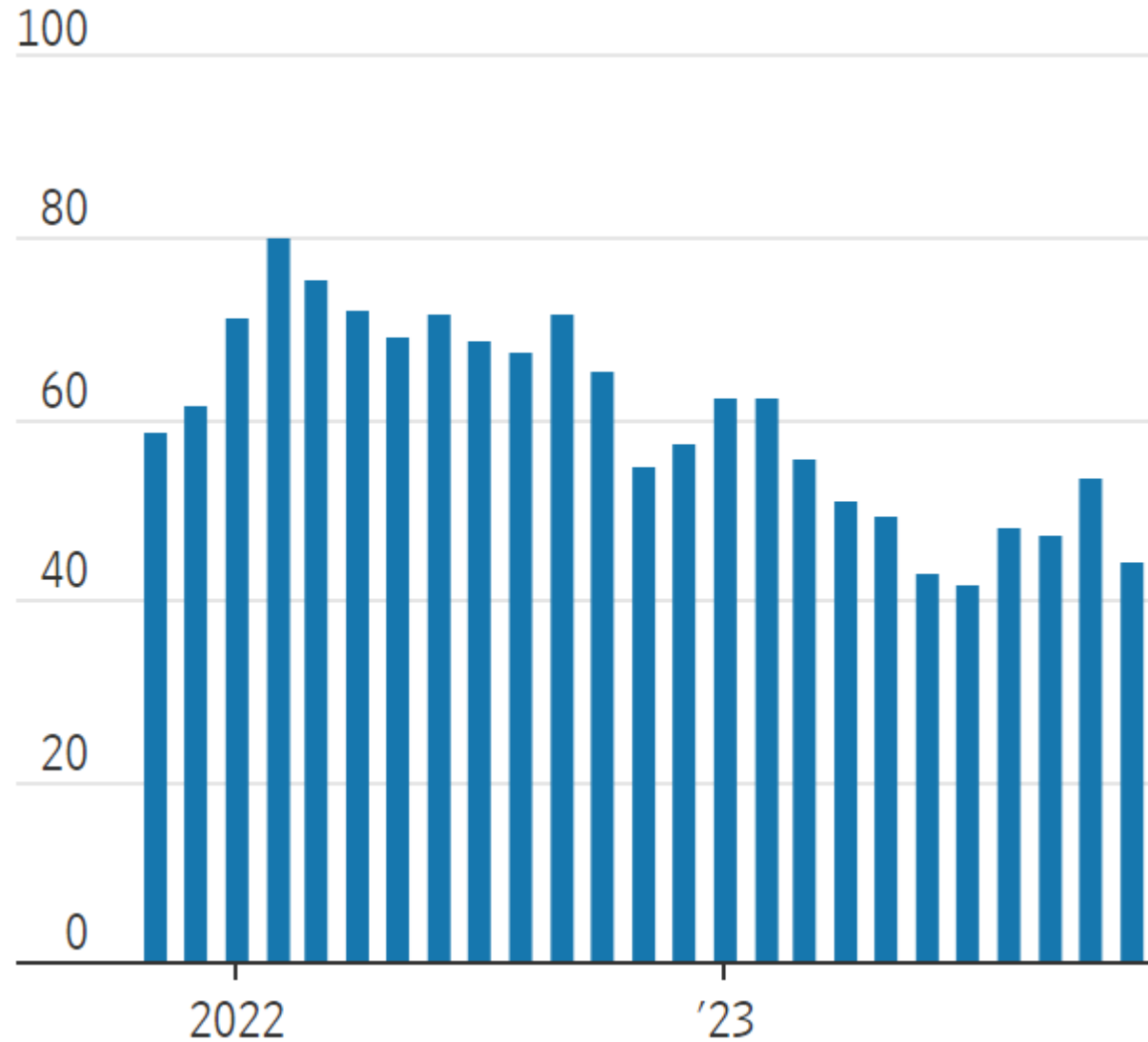


Source: Supply Chain Drive, BCG, 2023

# India's Electronics Exports Surge



# US Company Inventories



Source: WSJ; Logistics Managers' Index, 11/23

# US Change in Container Imports



Source: The McCown Report 3/23, Top 10 US Ports