MPA Terminals – Autos/Truck Units (Calendar Year)

![Bar chart showing units of Autos/Truck Units for 2018 and 2019]

- 2018: 636,575 units
- 2019: 631,398 units

Source: MPA Brass
POB Terminals – Autos/Truck Units (Calendar Year)

<table>
<thead>
<tr>
<th>Year</th>
<th>Import</th>
<th>Export</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>620,377</td>
<td>229,770</td>
<td>850,147</td>
</tr>
<tr>
<td>2019</td>
<td>629,059</td>
<td>228,831</td>
<td>857,890</td>
</tr>
</tbody>
</table>

Source: MPA Brass & Private

+ 1.4%
- 0.4%
+ 0.9%
Auto Market Share - Tons (Calendar Year)

**2019**
- Baltimore: 21.1%
- GA Ports: 19.6%
- Jaxport: 17.5%
- New York: 16.4%
- Providence: 10.3%
- Charleston: 7.3%
- Philly/Wilm: 6.1%
- Norfolk: 0.6%
- Boston: 1.1%

**2018**
- Baltimore: 21.0%
- GA Ports: 20.2%
- Jaxport: 17.8%
- New York: 19.0%
- Providence: 8.1%
- Charleston: 6.9%
- Philly/Wilm: 5.2%
- Norfolk: 0.8%
- Boston: 1.1%
• 9th consecutive year as the #1 Auto port in the USA.

• Mexico currently has 25 auto facilities.
  • All major OEMs have an assembly plant in Mexico. Nissan has three.
  • POB remains well positioned to receive vehicles from Mexico.

• Mercedes-Benz
  • MBUSA continues to be one of the MPA’s largest auto accounts.

• Subaru
  • Sold a record 700,000 cars in the USA in 2019
  • 4% of USA market share
  • 5th largest OEM at POB with approximately 60,000 units forecasted for 2020
• Fiat Chrysler Automobiles
  • 2019 imports were strong
  • Imports include Jeep Renegades (Italy), Ram ProMaster (Turkey/Mexico), Fiat (Europe), Alfa Romeo (Italy)

• Volkswagen Group
  • Will begin port operations at TradePoint Atlantic in June 2020.
  • Brands include VW, Audi, Porsche, Bugatti and Bentley

• American Honda
  • Honda has announced it will close U.K. plant in 2020 due to Brexit challenges. Import volumes will be affected as they will build the Civic Hatchback in USA.
  • Honda CRV exports to Mexico continues to be strong with 25,000 units exported in 2019.
  • Now the 2nd largest auto account at the POB with over 100,000 units moved through the POB in 2019
Performance Results / Opportunities

- **Mitsubishi**
  - Built on a strong 2018 into 2019 with 43,000 import units.
  - Imports include Outlander Sport (Japan) and Mirage (Thailand)
  - Has increased volume at POB by over 30,000 units since 2015.

- **Mazda**
  - 4th largest OEM in the POB with 80,000 vehicles in 2019.
  - Top imports include the small CX3 and the CX5. CX5 is a top seller in the USA.

- **Ford Motor Company**
  - Good volumes of F-150 and Mustangs continue to North Europe and Oceania.
  - EcoSport imports from India started in Q4 2017.
• **General Motors**
  • GM totaled 42,000 units at Dundalk Marine Terminal in 2019.
  • Most units arrive from Mexico and are GMC truck models and a wide range of SUVs.

• **Previous Owned (used) Vehicles – POVs**
  • Market has rebounded and remained strong in 2019.
  • Most exports go to West Africa.
  • MPA saw an increase of 9,000 export units last year (115,000 units total)

• **Electric Vehicles (EV)**
  • All OEMs are starting EV programs
  • At present, demand for EVs are not high in the USA.
  • Charging stations take too long to recharge batteries.
Current Challenges

- **Plant Closures due to COVID-19**
  - Europe: BMW / Mercedes-Benz / Jaguar Land Rover / Volvo / FCA / VW
  - North America: All are closed through Mid-April
  - Japan: All were operating through March.
  - Plans to re-open will depend on COVID-19 developments

- **POVs – Most go to West Africa**
  - Nigerian currency has dropped 10% to USD in the last 2 weeks
  - West African economies based on oil exports. Oil is trading at or near $20/bbl. In early January, oil was trading at approximately $60/bbl.
Questions?

Thank You!