

RoRo High & Heavy



Maryland Port Commission
June 2, 2020

High & Heavy RoRo Cargo 2019 - Highlights

The Port of Baltimore continues; #1 RoRo Port in the Nation

Continued large gains in exports, predominantly in agricultural/farming equipment to Europe, Asia and South America.

Mining and farming equipment to Australia

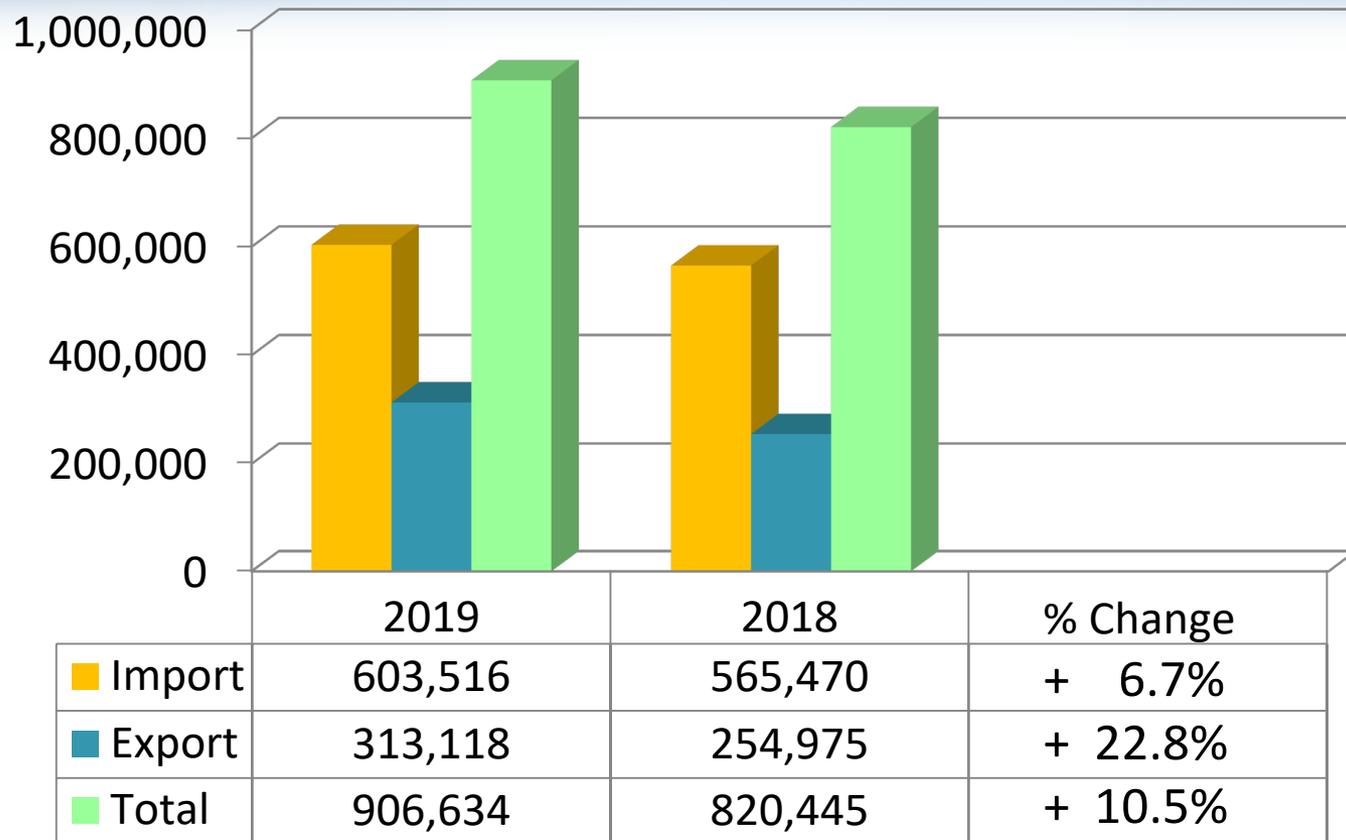
Strong dollar allow imports to gain as US construction markets improve.

With increasing grants/funding, steady and solid growth is expected to continue for the construction market

Baltimore's success in the roro market stems from many factors, including a geographic location as the closest east coast port to the Midwest, a large and diverse group of competing ocean carriers.



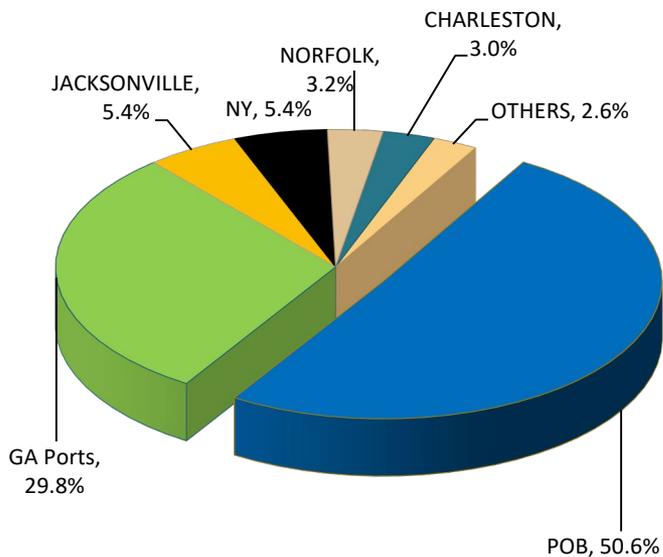
MPA Terminals – Ro/Ro (Tons) For Calendar Year Ending '19 vs '18



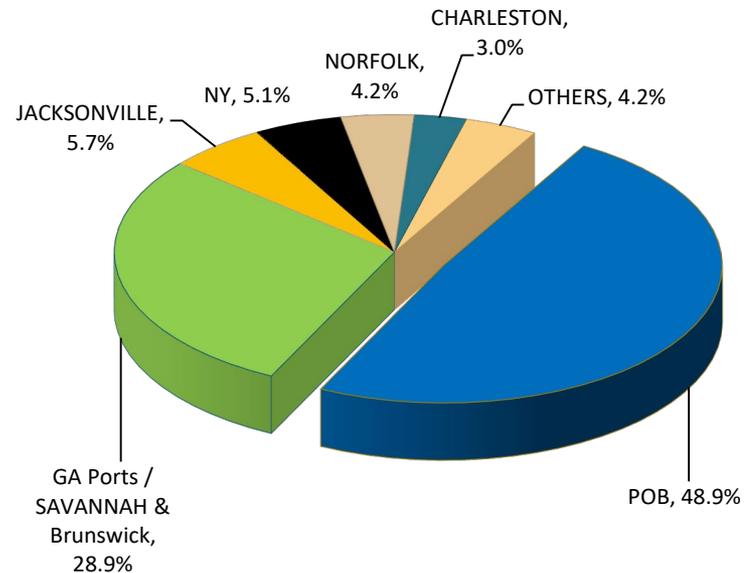
Source: MPA Brass

Ro/Ro Market Share – East Coast For Calendar Year Ending '19 vs '18

2019



2018



MPA Terminals Top OEM Performers 2019

OEM	MPA total roro tonnage 2019	MPA total roro tonnage 2018	Tonnage Change%
Caterpillar	179,000	140,000	+27.8%
John Deere/Wirtgen	97,000	127,000	-23.6%
Case New Holland	90,000	102,000	-11.7%
Komatsu	39,000	42,000	-7.1%
Volvo Construction	36,000	38,000	-5.2%
JLG/Oshkosh	23,000	23,000	0.0%
Doosan	18,000	20,000	-10.0%
LBX/Linkbelt	18,000	15,000	+20.0%



MPA Terminals Top Carriers 2019

Steamship Line	DMT Terminal Calls	MPA Total Ro/Ro Tonnage	% Change Tonnage Vs 2018
WWL / ARC	174	432,227	+ 3.2%
ACL / Grimaldi	148	234,168	+ 1.4%
K-Line	44	65,532	-8.0%
Hoegh	58	39,406	+ 693.0%
EUKOR	13	27,730	-2.6%
NYK	64	27,654	- 13.3%
MOL	70	22,322	+ 37.9%
Bahri, CSAV, LGL	22	13,318	- 39.9%



Issues/Opportunities

Agricultural update

The market remains optimistic however the continued trade tension combined with a year of difficult growing and harvesting conditions have caused farmers to become cautious on making major investments in new equipment.

Construction update

As the second-largest in the world (behind China), the U.S. construction markets 3.3% growth in 2019 confirm the market as stable and poised for growth.

Residential construction and road construction remains a strong driver as it represents about 40% of the total market.

Construction imports will remain strong due to the dollar's strength and OEM's like CAT, Deere, Wirtgen, Komatsu, Doosan, Volvo... Look to break into new markets/OEM's Mahindra(India), SANY, XCMG, LiuGong(China), Kobelco and Kubota(Japan) moving forward.

While the outlook for construction remains positive, tariff and economic uncertainty will continue to keep the market in check.



Issues/Opportunities

Global Mining poised to continued growth in 2019

Global mining continued rebounding indicating that 2019 will be the fourth consecutive year of growth.

With copper's stable performance, and gold, coal, bauxite performing well, the mining industry led by CAT, Hitachi, Komatsu and Liebherr continue to rebound leading into 2020.

Komatsu is importing large mining excavators for gold mines in SC.



Summary

Baltimore's inland advantage provides the most cost-effective and efficient supply chain routing for the Mid-Atlantic region, the Mid-West and beyond.

The Port of Baltimore has the expertise in handling all types of roll on/roll off cargo and offers; the inland advantage, first class facilities, specialized ocean carriers, Two Class 1 Railroads, close proximity to major highway systems and quality service which makes the Port of Baltimore the first choice for Roll On / Roll Off cargo.

With a unique and unrivaled quality QCHAT program that brings together all the key players in the roro supply chain, the Port's strong reputation for efficiency, quality and labor are all main factors in encouraging shippers and carriers to use Baltimore for their roro cargo.



Any Questions...

Thank You...

