



# ITR MONTHLY UPDATE

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## DECEMBER 16, 2020



# PARTICIPATING ASSOCIATIONS

ASSOCIATION FOR  
HIGH TECHNOLOGY  
DISTRIBUTION

**AHTD**



Convenience  
Distribution  
ASSOCIATION



**ecia**

Electronic Components Industry Association



**GAWDA**  
GASES AND WELDING DISTRIBUTORS ASSOCIATION



INTERNATIONAL SEALING  
DISTRIBUTION ASSOCIATION

[www.isd.org](http://www.isd.org)



National Association of  
Chemical Distributors



**NAHAD**

THE ASSOCIATION FOR HOSE AND ACCESSORIES DISTRIBUTION



**NAWLA**

North American Wholesale  
Lumber Association



Trends ■ Education ■ Leadership ■ Networking



North American Building Material Distribution Association



**PEI**



Security Hardware Distributors Association



association education alliance  
INNOVATION THROUGH COLLABORATION



**UVSA**

UNITED VETERINARY SERVICES ASSOCIATION  
The Pulse of the Industry



Wallcoverings Association



Wholesale Florist & Florist Supplier Association

# IAN HELLER Moderator

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- Founder and Senior Partner, Distribution Strategy Group
- MBA, Kellogg School of Management at Northwestern University
- Known for his expertise for his research, consulting, analytics and thought leadership within the distribution industry



# ALEX CHAUSOVSKIY Panelist

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- Senior Business Advisor, ITR Economics
- Highly experienced market researcher and analyst with more than a decade of expertise
- Featured on NPR, the BBC, and in Wall Street Journal



# Long-Term Potential Upside

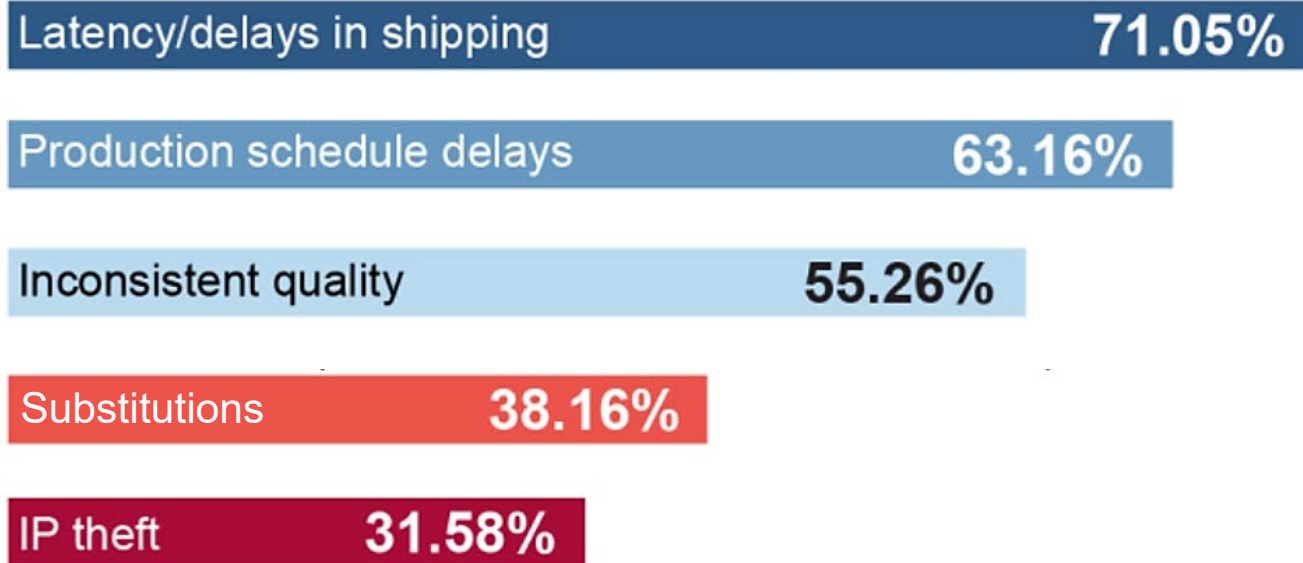
## US manufacturers reconsider supply chain vulnerabilities

- Develop alternate sourcing
- Near-sourcing trend enhanced

Broader Understanding that the 2020s  
is the decade of North America



# Onshoring/Reshoring



# Risk Assessment

## 2020 Supply Chain Risk of Various Trading Partners

FM Global  
Resiliency Index

100

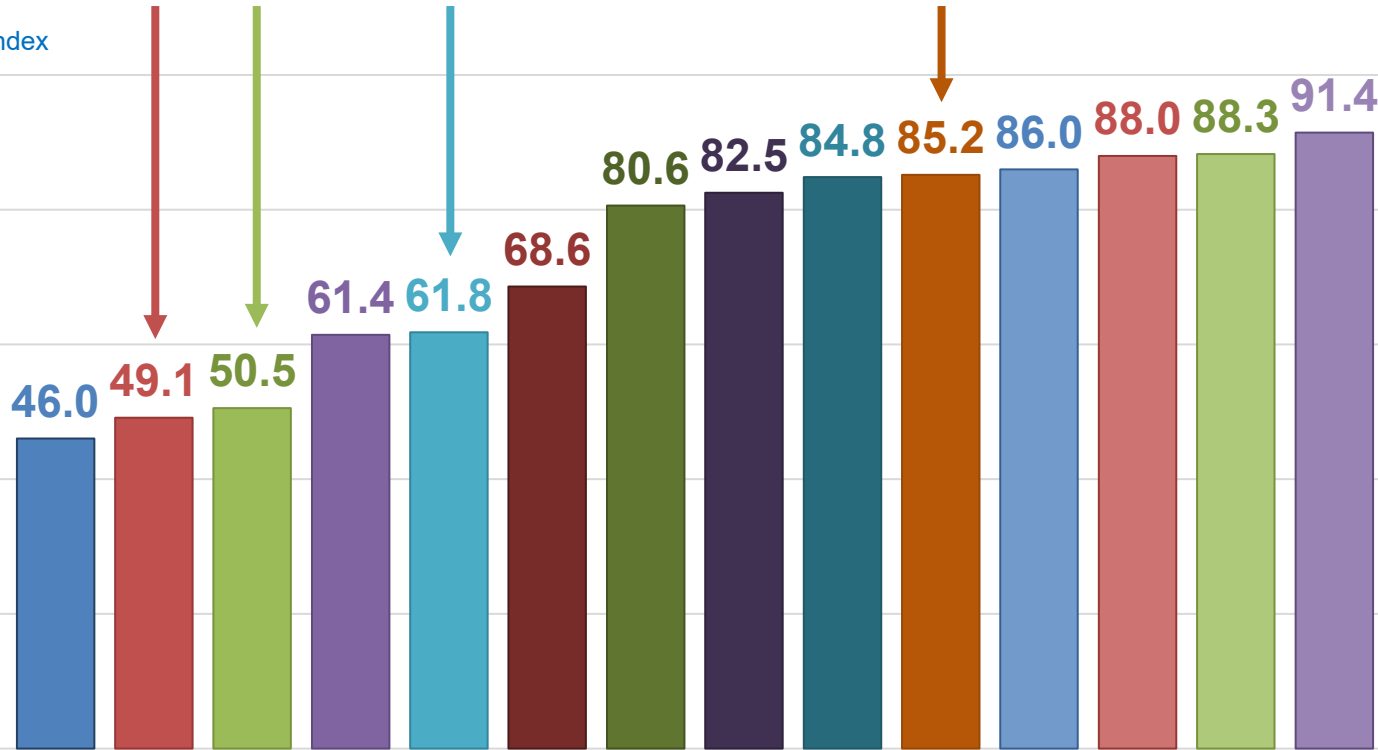
80

60

40

20

0



- Russia
- Vietnam
- Mexico
- Thailand
- China
- Italy
- Australia
- Taiwan
- France
- U.S.
- Japan
- Canada
- Germany
- UK



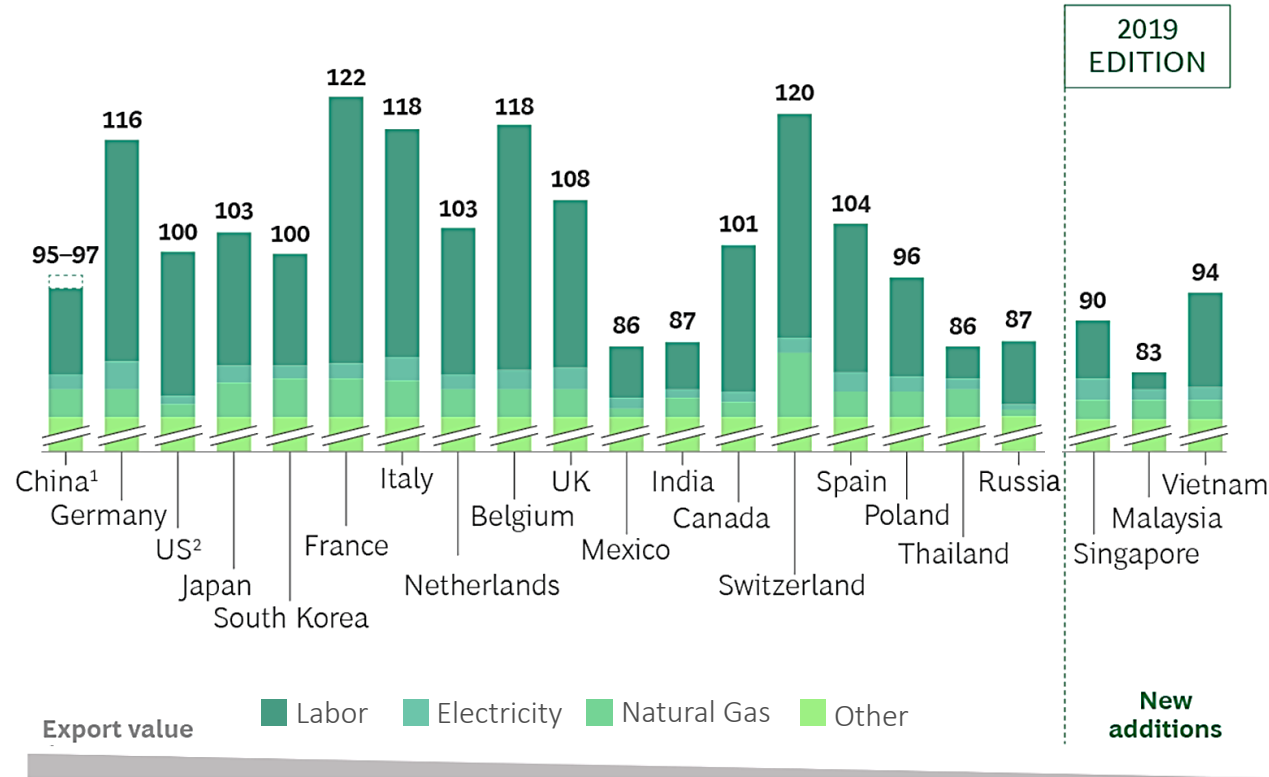
First In Forecasts Worldwide

Scale 1 to 100, Where 100 Indicates Most Resilient

Source: FM Global Resiliency Index

# The US Compares Well Globally

## Manufacturing Cost Index



First In Forecasts Worldwide

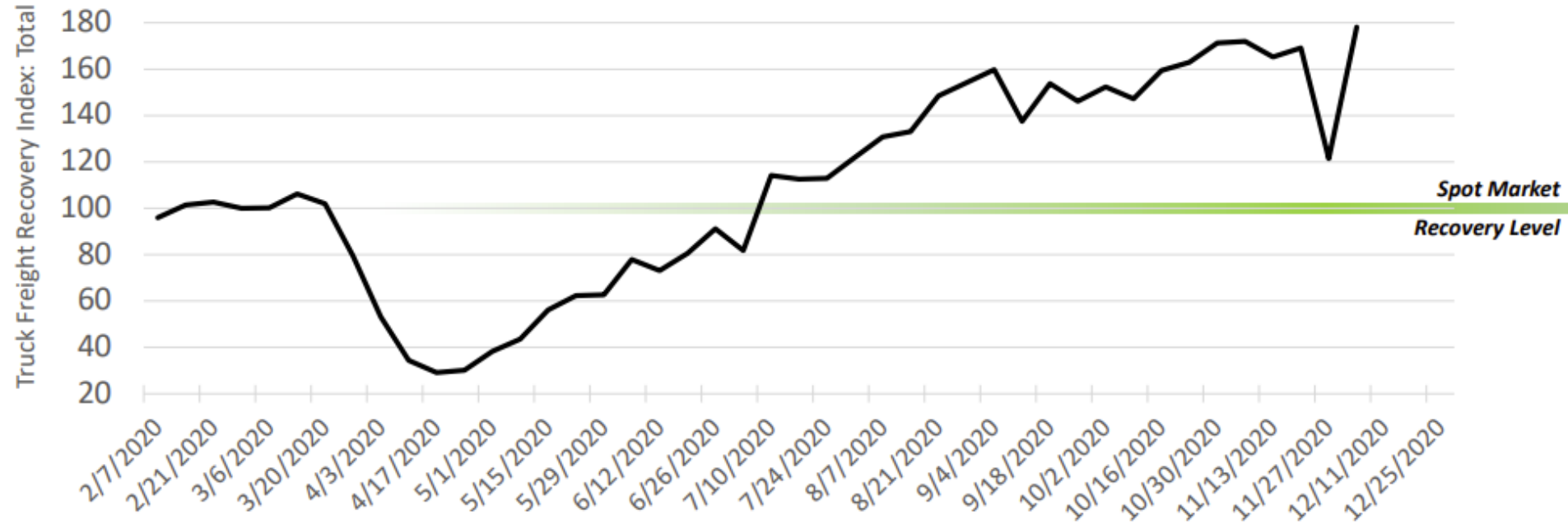
Cost Index: US = 100

Source: BCG (Boston Consulting Group)



# A Strong Indication of Demand

## US Truck Freight Recovery Index Total Spot (all truck types)



First In Forecasts Worldwide

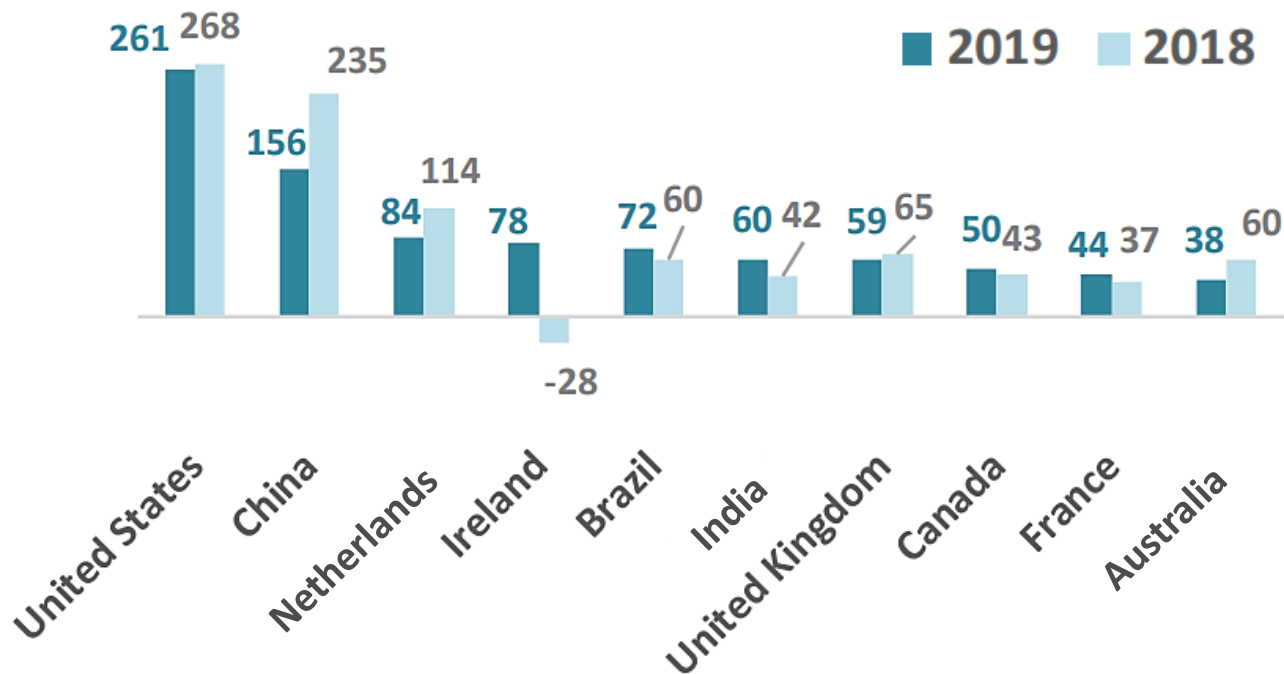
100 = Full recovery to pre-pandemic volumes

ITR ECONOMICS

Sources: Truckstop.com Spot Market Insights, analysis by FTR Transportation Intelligence™

# US Tops the List of FDI Recipients

FDI Inflows, Top 10 Major FDI Recipients in 2019



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Billions of US Dollars

Source: OECD



# QUESTIONS

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**THANK YOU!**

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**NEXT ITR UPDATE:  
JANUARY 20, 2021**

