



# ACC NEWS



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**YOUR WEEKLY UPDATES**

**Week 50 of 2020**



*Healthcare*



*Ports*



*Shipping*



*Rail*



*Supply Chain*



**Who Will Be In First Wave Of COVID Shots?**

*Beverages*



*Retail*



*C-Stores*



*Road*



*Handling*



**Still So Much To Learn**

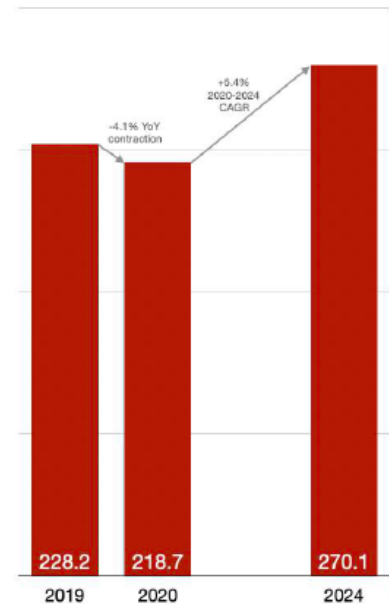
- Slide 3 – State of play: Retail in the pandemic
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- It's been a long half-year since most businesses in the U.S. went into lockdown. Most companies didn't have a plan for something as unprecedentedly widespread as this pandemic proved to be. In a matter of days in March, city streets emptied, businesses boarded up and many had to contend with the stark reality that they might not have what it takes to weather the oncoming storm.
- Almost overnight, businesses had to ramp up plans for curbside delivery, in-store pickup and contactless payments while dealing with new safety protocols and the logistical nightmare of getting products on shelves. Companies had to find new ways to stay in touch with customers when they couldn't connect in person and figure out how to get them to keep shopping in the midst of growing economic uncertainty.
- For many retailers who have either just joined the world of ecommerce or who have ramped up their offerings during the pandemic, fulfilling orders has become a challenge. Even if they have products in stock, the increasing number of companies shipping products — and weaknesses in the capacity of the U.S. Postal Service — makes it hard to live up to the standards that giants like Amazon have taught customers to expect.
- But with the busiest retail season of the year bearing down on companies, things are unlikely to get better before they get worse. Even the largest companies have staffed up; Amazon recently announced it was hiring 100,000 more workers after bringing on the same number over the summer to deal with the surging demand. "It's like Christmas every day," said Bob Biesterfeld, CEO of the transportation and logistics firm C.H. Robinson.
- It's unclear whether the logistical nightmares of the early pandemic days are going to repeat themselves as consumers ramp up spending for the holidays, but some think the issues exposed by this period will lead to long-term changes.
- Before March, the majority of people still bought things in physical stores — as big as Amazon is, it's still a relatively small slice of the retail pie. And even in lockdown, that hasn't changed too much: Before the pandemic, ecommerce accounted for about 12% of total retail sales, according to the U.S. Department of Commerce, and Amazon's share of that is usually around 20%. And even into August, around five months into lockdown and the most recent month the Commerce Department has data for, ecommerce accounted for only about 16% of all retail sales.
- Some retailers had rolled out BOPIS before, but like so many things, the pandemic accelerated usage. **protocol**

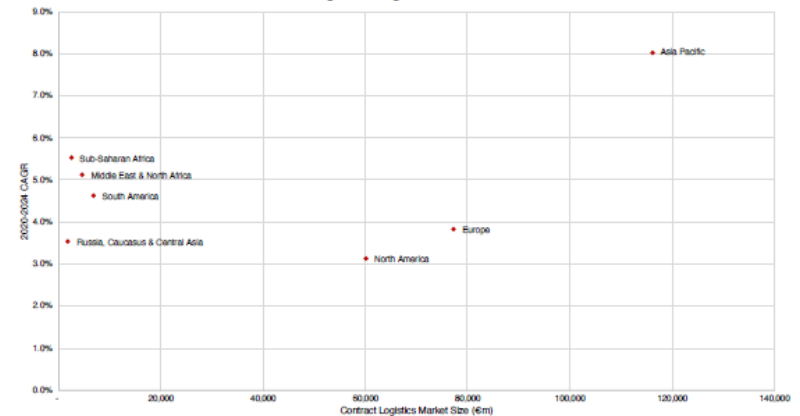
- The global contract logistics market is expected to grow at a real compound annual growth rate of 5.4% between 2020-2024. The forecast paints a positive picture of a market set to grow impressively over the period, but it should be noted that 2020 will be a painful year for contract logistics providers, with a contraction of 4.1% expected.
- North America's contract logistics market is forecast to expand at a CAGR of 3.1% over the 2020-2024 period. However, the region will see its contract logistics market shrink 3.7% in 2020. The North American economy has been hard hit by the pandemic and at the end of 2020, it is still suffering. Its GDP forecast for 2020 looks gloomy at -4.9%, however, like all regions it is forecast to rebound in 2021, although over the forecast period growth will return pre-pandemic levels of around 1.9% in 2024. The US is the by far largest contract logistics market in the region with an 87% share.
- Manufacturing in the US and Canada successfully bounced back after a huge slump in mid-2020. The US' PMI slipped to 36.1 in April but reached 53.4 in October, whilst Canada's fell to 33.0 but exceeded 2019 levels and reached 56.0 over the same period. Mexico's progress, however, has stumbled. IHS Markit reported in October 2020, "goods producers forecast lower production volumes in the coming 12 months". Business closures, unemployment and a decline in new orders look to be considerable factors. Despite this, the region has seen improvements in some industries like automotive. The sharp but rapid shock the pandemic had on automotive production has meant it was able to start up again quickly.
- Whilst the industry has remained resilient during this time, further economic issues such as a recession could weaken it. However other sectors, such as aerospace, are still under pressure and look set to remain so for some time.



Global Contract Logistics Market Size & Growth (€bn)



Global Contract Logistics - Regional Market Size & Growth 2024

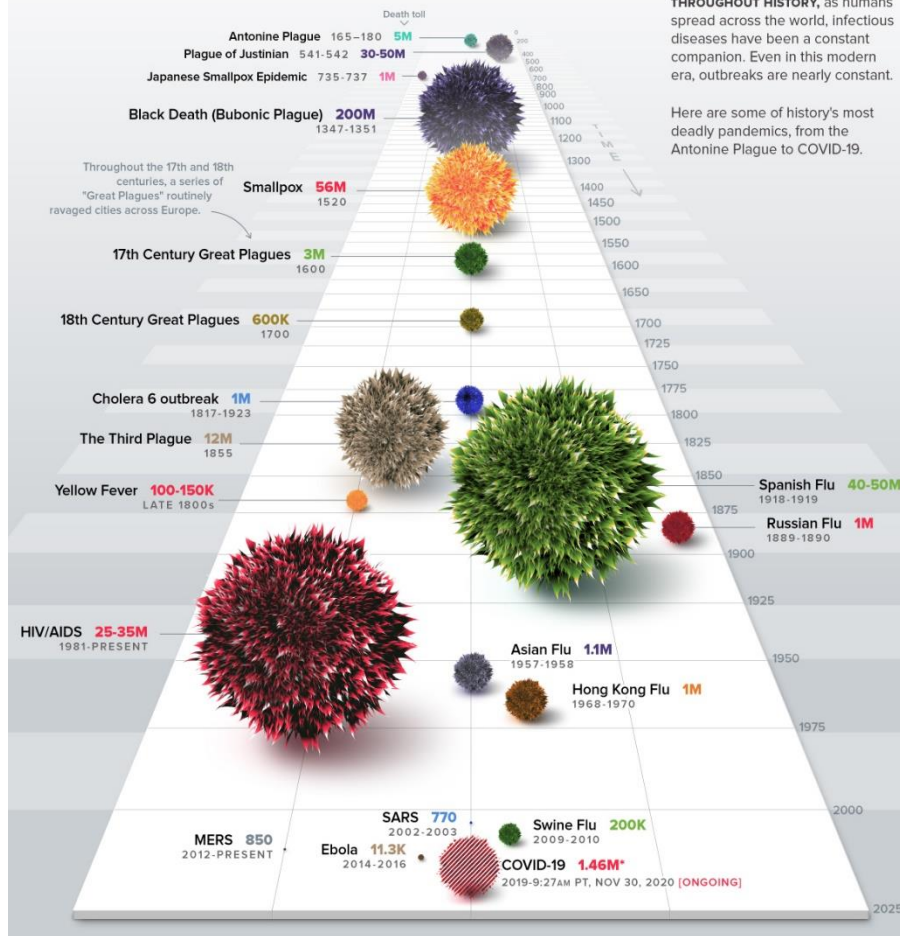


## HISTORY OF PANDEMICS

PAN-DEM-IC (of a disease) prevalent over a whole country or the world.

THROUGHOUT HISTORY, as humans spread across the world, infectious diseases have been a constant companion. Even in this modern era, outbreaks are nearly constant.

Here are some of history's most deadly pandemics, from the Antonine Plague to COVID-19.

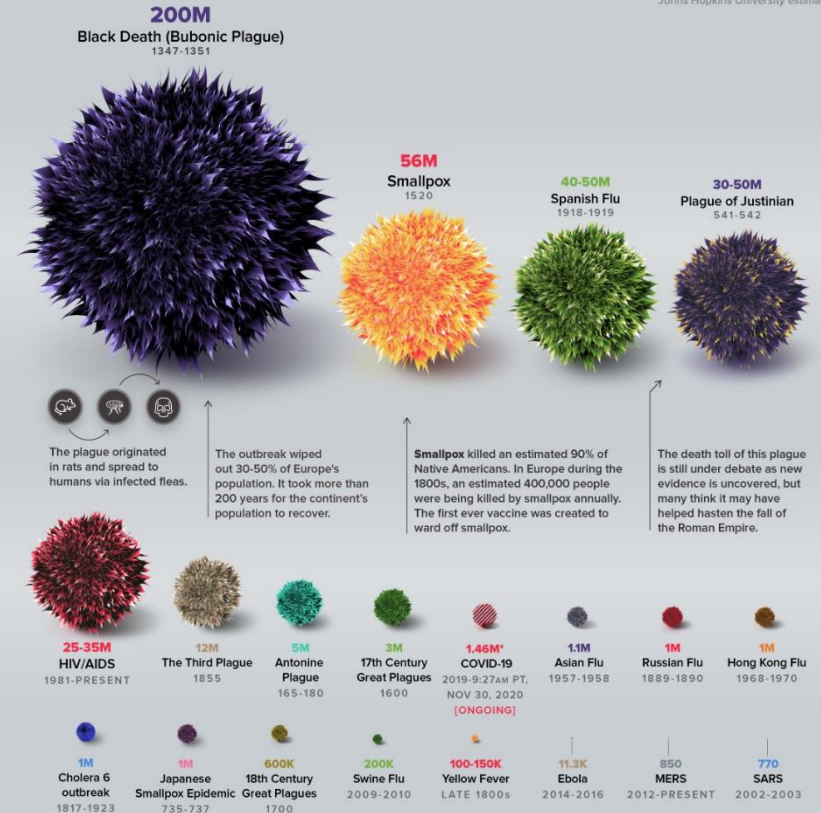


### DEATH TOLL [HIGHEST TO LOWEST]

WHO officially declared COVID-19 a pandemic on Mar 11, 2020.

It is hard to calculate and forecast the impact of COVID-19 because the disease is new to medicine, and data is still coming in.

\*Johns Hopkins University estimates



\*Johns Hopkins University estimates

Sources:  
CDC, WHO, BBC,  
Wikipedia,  
Historical records,  
Encyclopedia Britannica  
Johns Hopkins University



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# Retail Update

6

## Store of the future initiatives in Food & Beverage **EDGE<sup>^</sup>** BY ASCENTIAL

Lawson (China) – Oct 2020  
Expands convenience store network



Carrefour (China) - Oct 2020  
Opens community fresh produce store



Walmart Asda (UK) – Oct 2020  
Opens sustainability trial store



Alibaba Freshippo (China) – Sept 2020  
Launches membership-only store



ShopRite (US) – Oct 2020  
Opens store-within-a-store concept



X5 Retail Group (Russia) – Oct 2020  
Opens first fully automated store



Walmart (US) – Sept 2020  
Launches digitally-inspired store concept



Mercadona (Spain) – Oct 2020  
Opens plastic-free concept store



Carrefour (Taiwan) – Sept 2020  
Opens new self-service store



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# Retail Update

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## Ecommerce and digital ecosystem management initiatives in Food & Beverage

EDGE<sup>^</sup>  
BY ASCENTIAL

Kroger (US) – Oct 2020  
Teams with Whisk on shoppable recipes



X5 Retail Group (Russia) – Aug 2020  
Rebrands Perekrestok for larger missions



Amazon Fresh (UK) – Sep 2020  
Extends grocery service to Greater London



Ahold Delhaize (Netherlands) – Sep 2020  
Launches delivery app for smaller households



Albertsons (US) – Oct 2020  
Adds meal planning service to digital menu



Carrefour (Belgium) – Oct 2020  
Introduces new Carrefour app



Globus (Russia) – October 2020  
Partners with iGoooods on online store



Waitrose (UAE) – Oct 2020  
Launches ecommerce service in UAE



El Corte Ingles (Spain) – Oct 2020  
Launches personalized same-day app



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## What Will Happen to E-commerce After the Pandemic Is Over? **MARTECHSERIES**

- By now, the market trends are clear — industries that are conducive to social distancing are thriving, and others aren't. E-commerce is a major beneficiary of the pandemic, with e-commerce growth said to have accelerated the equivalent of 4 to 6 years under non-pandemic projections.
- However, now that a coronavirus vaccine emerges, there's an end in sight to the pandemic — and to “the new normal.” So, what's going to happen to the e-commerce industry after the pandemic is over? Will consumers go back to their old ways, or will they continue their newly-developed habits of online shopping?
- The short answer is, it's hard to know for sure, but it seems like COVID-19 will have a lasting impact on consumer behavior.
- Adobe's Digital Economy index tells us that “COVID-19 has changed business forever.” It's true that, at the beginning of the pandemic, total consumer spend on e-commerce retailers was \$52 billion more than that of the previous April and May. However, only time can really tell if this massive increase in online shopping from the early days of the pandemic will continue past the distribution of the coronavirus vaccine.
- Even if consumers have grown accustomed to online shopping, they might not actually need to continue shopping. Consumer panic and the “panic buying” phenomenon have been well-studied over the past half year, and the trends in online shopping could simply be attributed to mass anxiety.
- In other words, COVID-19's effect on e-commerce will be decided by either consumer habits or consumer emotions. If consumer habits come out stronger, then people are likely to shop online to meet all their needs, and e-commerce retailers can rejoice. However, if consumer emotions prevail, then people will be calmer and may no longer continue to make panic purchases online, and demand for e-commerce may decrease.
- While it can be fun to speculate, we will never be able to predict the future for certain, so it is best to focus on the things we can control. Now's a great time to revisit your business model to make sure it's conducive to online and in-person shopping. It doesn't hurt to prepare for both possibilities. And whatever you do, make the customer experience your top priority, so that you can build strong customer loyalty that can outlast the pandemic and any vaccine.





## Sephora to open hundreds of in-store shops at Kohl's ~~CSA~~

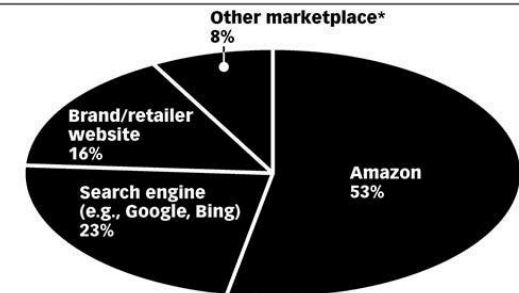
- The department store retailer and Sephora announced a long-term partnership that will see the beauty giant open hundreds of in-store shops inside Kohl's stores. Some 200 shops will open by next fall and expand into at least 850 Kohl's stores by 2023. The deal comes less than a month after Target Corp. announced an in-store partnership with Ulta Beauty.
- The Sephora at Kohl's shops will average 2,500 sq. ft. and be prominently positioned at the front of the store. The shops will offer about 100 brands, including some higher-end, and replace Kohl's current beauty assortment.
- Exterior signage for the in-store shops will feature both Kohl's and Sephora branding. Some of the shops will have their own entrance.



## Where US consumers begin their product searches ~~CSA~~

- A majority share of consumers are now taking to marketplaces first when shopping online. According an August 2020 survey from ecommerce ad agency ChannelAdvisor conducted by Dynata, 53% of US adults said they began product searches at Amazon when planning to make a digital purchase.
- Consumers are also intending to lean on Amazon heavily this holiday season. About two-thirds of respondents to the ChannelAdvisor and Dynata survey said they planned to research gifts on Amazon, 20 points ahead of Google.
- “Research also continues to find that, for the most part, consumers are fine with the ad experience on Amazon—despite the fact that sponsored listings and other non-organic results continue to take up ever more real estate on the first search results page,” said Nicole Perrin, eMarketer principal analyst at Insider Intelligence and author of our new report, “Amazon Advertising 2020.”

**Digital Channels Where US Adults Begin Their Product Search When Digitally Purchasing Products, Aug 2020**  
% of respondents



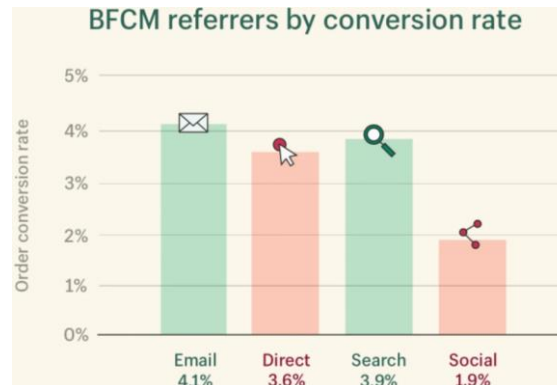
Note: \*eBay, Walmart, Target, Newegg, etc.  
Source: ChannelAdvisor as cited in company blog conducted by Dynata, Oct 9, 2020  
260280 [www.eMarketer.com](http://www.eMarketer.com)



## Black Friday Cyber Monday (BFCM) numbers are in



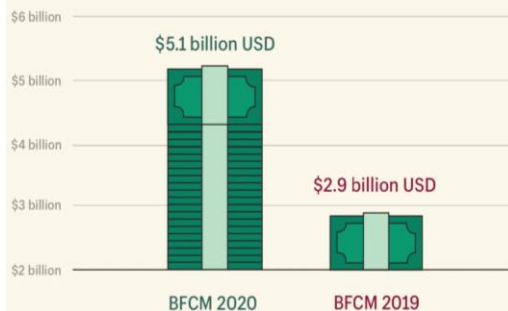
- We knew BFCM would be different this year, but different how? Every BFCM, we follow our merchants' online sales in real-time. This year, we wanted to see exactly how COVID-19 accelerated broader trends in commerce.
- BFCM serves as a microcosm of global commerce and offers a glimpse for the year to come. To fully grasp where things are headed, we need to analyze more than sales data—we need to reflect on how independent businesses adapted, how consumers responded, and what this means for 2021 and beyond.
- 2020 was also the longest BFCM season to date. Business owners ramped up their campaigns and promotions as early as November 12th this year, with many expecting to continue well into December — a strategic decision made to mitigate supply chain disruptions and shipping delays.
- Pre and post COVID-19 differences are apparent throughout.
- Here's what we found.



### Average cart price for local delivery on Black Friday



### 76% increase in sales worldwide YoY



### BFCM by the numbers



### Average cart price for curbside pickup on Black Friday



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## Walmart drops shipping minimum for Walmart+ members EDGE<sup>^</sup> BY ASCENTIAL

- Walmart is removing the USD35 shipping minimum on Walmart.com orders for its subscription program members. The move extends the Walmart+ value proposition and adds to benefits such as free unlimited deliveries from Walmart stores, easier in-store returns, fuel savings, as well as a Scan & Go service.
- Walmart debuted a USD98-a-year subscription plan Walmart+ in September in a move that positions it more directly against rival Amazon and its Prime subscription program. Free next-day, and increasingly same-day delivery, has been one of the key benefits of Prime that has raised the bar on convenience and fulfillment speed in the market. Other retailers have also been improving their fulfillment offer, with Target extending its same-day services such as Drive up, Shipt and Pick-up, as well as Ahold Delhaize extending the reach of its pick-up services.

## What the pandemic hath wrought: five key grocery trends CSA

- “In the face of significant challenges, retailers have been finding more creative ways to engage with their consumers, and this has naturally accelerated the trend toward employing omnichannel strategies,” said Mike Conway, VP of national accounts and retailer partnerships at PECO, which owns and or operates more than 300 centers in the U.S.
- Here are five key trends the PECO team has seen flourish during the pandemic:
  1. **Ghost kitchens.** These efficient additions to the foodservice business fill increased demand for takeout and delivery service without opening a storefront.
  2. **Groceraunts.** Supermarkets and restaurants are pairing up to create more diversified offerings at grocery-anchored centers.
  3. **Drone delivery.** The adoption of drone delivery among retailers took off during the pandemic, with Walmart taking the lead.
  4. **5G arrives.** As 5G networks and devices proliferate, retailers have more options to create the interactions and experiences that customers crave using such tools as virtual and augmented reality.
  5. **Discount brand growth.** Retailers like Five Below and Dollar Tree have continued to expand across the country.





## The Rapid Growth of E-Commerce Logistics **MH&L** Material Handling & Logistics

- Growing e-commerce sales are driving up U.S. e-commerce logistics costs with a 19.9% CAGR expected through 2020, according to a new report from Armstrong & Associates, Inc.: ***Rising Tide: The Rapid Growth of E-Commerce Logistics, 3PL Solutions, Last-Mile Delivery, and the Dominance of Amazon.***
- Adjusted retail e-commerce sales in Q2 of 2020 hit \$211.5B, according to the Census Bureau of the U.S. Department of Commerce. The number is due to the COVID-19 driven increase of 31.8% from Q1 of 2020, and a whopping 44.5% increase from Q2 of 2019.
- E-commerce retail now represents 16.1% of retail sales in the United States. The segment grew at a 14.6% CAGR from 2015 through 2019 and shows no sign of slowing.
- Growing e-commerce sales are driving up U.S. e-commerce logistics costs with a 19.9% CAGR expected through 2020. E-commerce logistics costs currently account for 9.9% of total U.S. logistics costs.
- E-commerce is the fastest-growing 3PL Market segment. Retailers are increasingly relying upon Amazon and 3PLs to help manage omnichannel and e-commerce supply chain operations.
- U.S. 3PL e-commerce revenues reached \$43.4B in 2019, and the firm expects 28% growth through 2020 as e-comm purchases continue to expand during the pandemic and companies continue to outsource logistics activities.
- With its dominant position, Amazon's operations boast an estimated 60% market share of the U.S. e-commerce 3PL market segment.

**Prepare to confront the forces of oversupply** SupplyChainDigest™  
Your First Stop for Supply Chain Information  
Lord's discussion on "confronting the forces of over-supply," nicely summarized in the graphic on the right.

Pursuit of Minimum Supply Cost	Pursuit of Maximum Growth
<ul style="list-style-type: none"><li>• Overbuying to minimize total supply cost</li><li>• Overproduction to maximize utilization</li><li>• Lean networks lack agility to control inventory risk</li></ul>	<ul style="list-style-type: none"><li>• Overoptimistic demand projections</li><li>• Exuberant anticipation stock builds</li><li>• Relaxed service policies allow changes, cancellations and returns</li></ul>

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**Gartner**

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## Supply chain and fulfilment initiatives in Food & Beverage **EDGE<sup>^</sup>** BY ASCENTIAL

7-Eleven (US) – October 2020  
Adds US largest delivery platforms



Sainsbury (UK) – November 2020  
Launches On-demand delivery



Tesco (Ireland) – September 2020  
To trial drone delivery for grocery



Walmart Sam's Club (US) – October 2020  
Launches ship-from-store program



Kaufland (Romania) – October 2020  
Partners with Foodpanda



Ahold Delhaize Food Lion (US) – Sep 2020  
Expands grocery pick-up service



Woolworths (AUS) – October 2020  
Rolls out micro-fulfilment tech



Kroger and Ocado (US) – October 2020  
Announce fulfilment centre in Michigan



Adi UK – November 2020  
To extend click & collect trial



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## 6 Strategies for a More Resilient Supply Chain **Gartner.**

- In the wake of COVID-19 and other disruptions, supply chain leaders have to balance resilience and efficiency to secure their networks.
- Brexit, the U.S.-China trade war, a general geopolitical trend toward nationalization — and lately the COVID-19 pandemic — have changed the priorities of many supply chain leaders. They now need to balance cost and operational efficiency with greater resilience.

**Strategy No. 1: Inventory and capacity buffers** - Buffer capacity is the most straightforward way to enhance resilience, whether in the form of underutilized production facilities or inventory in excess of safety stock requirements.

**Strategy No. 2: Manufacturing network diversification** - In response to the U.S.-China trade war, many companies have begun to diversify their sourcing or manufacturing bases.

**Strategy No. 3: Multisourcing** - In 2011, major natural disasters in Japan and Thailand disrupted supply chains across the world and exposed companies' reliance on single sources of supply.

**Strategy No. 4: Nearshoring** - Beyond multisourcing, some companies want to reduce geographic dependence in their global networks and shorten cycle times for finished products.

**Strategy No. 5: Platform, product or plant harmonization** - The more regionalized the network, the more harmonized plant technology has to be to allow products to move seamlessly across the network.

**Strategy No. 6: Ecosystem partnerships** - The COVID-19 crisis has shown the need to have a diversified approach to sourcing. At the same time, however, collaboration with strategic raw material suppliers and external service partners is also vital to ensure better preparedness and resilience for the future.

- Gartner survey data shows that around half of supply chain organizations are either using external manufacturers or exploring how they can support product moves, with a similar proportion engaging logistics partners for this purpose.



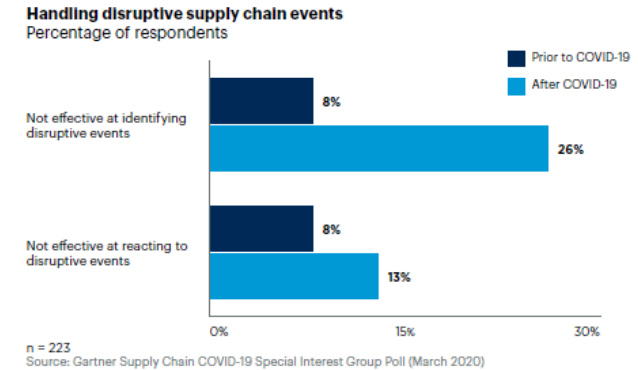
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## Handling Disruptive supply chain events **Gartner**

- The average supply chain organization was complex before the coronavirus pandemic. What COVID-19 introduced was a new level of complexity, requiring supply chain leaders to better sense and respond to exponential ramifications — disruptions to suppliers' suppliers or impacts to the organization's customers' customers. Although a vast majority of supply chain organizations felt that they were capable of sensing and responding to disruptive events prior to COVID-19, the pandemic's arrival quickly invalidated or called into question this assertion for many.
- Agile — the quality of managing change in supply chain through effective sense and response capabilities — is a concept that many supply chain leaders struggled with replicating and scaling within their organizations even before the coronavirus pandemic. Agility can be attained, but it requires chief supply chain officers (CSCOs) to identify and enable the people and capabilities necessary to support new and more digital workflows.
- And despite the COVID-19 outbreak, CEOs tapped digital business for increased investment in 2020. In fact, 47% expect to increase the speed of their digital initiatives in order to find innovative ways to drive growth. And this trend pervades supply chain: Gartner's 2020 CEO and Senior Business Executive Survey revealed many CSCOs are choosing to increase their investments in technology in response to COVID-19.



## Wild freight market changes the capacity strategy **CCJ**

- There is no denying it... 2020 has changed the freight business. 3PLs, carriers and shippers alike have felt the whiplash of the freight market pendulum.
- Pricing power in the freight market moves like a pendulum, and in 2020 the buyers (shippers and 3PLs) and sellers (carriers) of transportation capacity have seen the direction change multiple times.
- In September, the load-to-truck ratio in the DAT network reached 5.5 loads available for every truck. This was the highest watermark since June 2018, and the trendline is expected to rise further in the peak retail season. Ratios for refrigerated and flatbed loads have also reached the highest mark since June 2018.

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## Inventory replenishment leads to elevated trucking demand



Demand for consumer products remains high... making it increasingly difficult for retailers to keep products on the shelves. This inventory replacement cycle seems to have no end in sight... and it's keeping demand for truck capacity elevated. Freightwaves suggests inventory correction will last well into 2021... contributing to the existing capacity shortage. For shippers this means a new year with the same old elevated demand, tight capacity and rising rates.

## Biggest driver decrease ever recorded JOC.com

The number of truck drivers is experiencing 'the biggest downturn it's ever seen' according to FMCSA data. Typically, a recession would lead to a glut of available truck drivers looking for work. But this year is different. There has been a 4.4% decrease in truck drivers since July... and its being reflected in record high spot rates. But JOC says if this current climate continues, drivers should head back into the market into Q1 2021.

## XPO to split transport, logistics businesses FREIGHTWAVES

- The founder, chairman and CEO of transport and logistics giant XPO Logistics Inc. and his board of directors said that they plan to spin off XPO's transportation and logistics businesses into two separate companies: XPO's North American and European less-than-truckload (LTL) and truckload brokerage businesses, which, for now, will be called XPORemainCo, and a newly created company, comprised of XPO's North American and European logistics units, called NewCo. Permanent names for each company will be chosen at a later date, according to an XPO spokesman.
- Jacobs will be chairman and CEO of XPORemain and will become chairman of the NewCo board. XPO President Troy Cooper will serve as XPORemain's president. The current leaders of the logistics businesses on both continents will continue to serve in "senior positions" with NewCo, XPO said in a statement late Wednesday. The company did not identify any of those leaders or what roles they will play should the spin-off occur. Ashfaque Chowdury runs the company's North American and Asian logistics businesses. Richard Cawston heads up those operations in Europe.
- The transaction is expected to be completed during the second half of next year, XPO said. The company cautioned that there is no assurance that a separation will occur. If the deal is consummated, each company will trade independently on the New York Stock Exchange.

## Woolworths (AUS) rolls out micro-fulfilment tech EDGE<sup>^</sup> BY ASCENTIAL

- Woolworth has deployed its first micro-fulfilment center in Melbourne. Located at the back of its existing supermarket, the 2,400 m<sup>2</sup> space uses automated technology to sort and move products from storage units directly to team members hand picking customer orders.
- As logistics costs challenge ecommerce profitability and congested urban infrastructure hinders last-mile delivery, retailers have been looking for automated solutions to drive speed and efficiency.
- Grocers have been actively exploring micro-fulfilment solutions in the past 18 months, with retailers such as Albertsons, Ahold Delhaize and Woolworths (AUS) forging partnerships to test the technology.
- As micro-fulfilment centers use automation to pick, pack and transport merchandize, brands will need to adjust product packaging in a way that it can be easily identified and mechanically handled.



With the micro-fulfilment tech Woolworths will be able to deliver products faster and help dispatch five times the order volume of a standard Woolworths store. The micro-fulfilment centers can hold up to 10,000 of the most on-demand grocery items.

## Cyberattacks Discovered On Vaccine Distribution Operations The New York Times

- A series of cyberattacks is underway aimed at the companies and government organizations that will be distributing coronavirus vaccines around the world, IBM's cybersecurity division has found, though it is unclear whether the goal is to steal the technology for keeping the vaccines refrigerated in transit or to sabotage the movements. The findings are alarming enough that the Department of Homeland Security plans to issue its own warning to Operation Warp Speed, the Trump administration's effort to develop and distribute coronavirus vaccines, federal officials said.
- IBM researchers have detected a global phishing campaign targeting organizations associated with an overseas supply chain used for vaccine distribution. The company said spoofed emails impersonating a Chinese biomedical executive targeted organizations in six countries, including Germany, Italy, South Korea, the Czech Republic and Taiwan.

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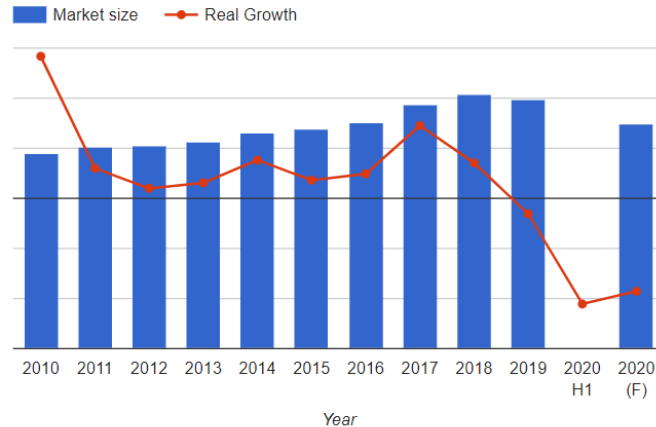
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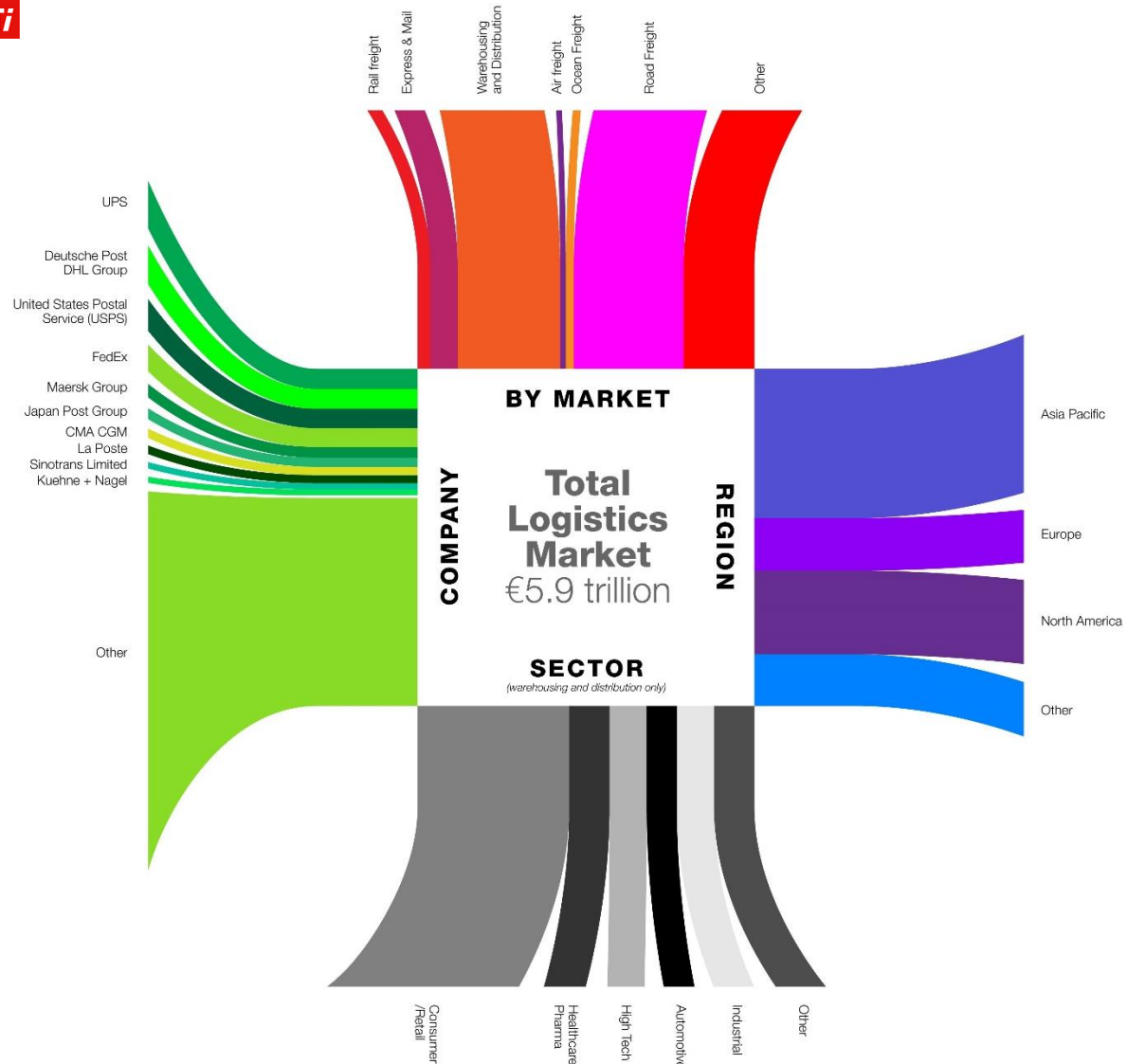
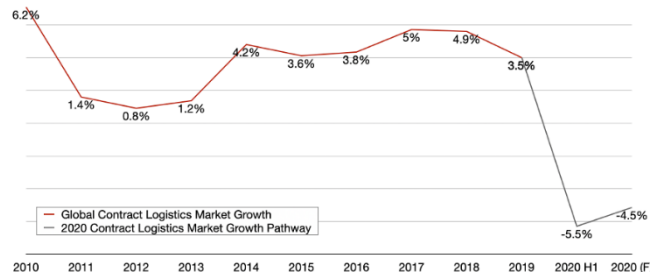
## Global Supply Chain Intelligence (GSCI)



Global Freight Forwarding: October 2020 Update Market Size & Growth



Global Contract Logistics Market Size & Growth 2010-2020





## CP proposes new transload hub in British Columbia

- Canadian Pacific has proposed the construction of a multimodal, multicommodity transload and logistics facility next to its existing intermodal terminal in Pitt Meadows, British Columbia.
- The 100-acre facility would have three major rail and transload components, including:
  - an agricultural hub where Canadian agricultural products would be received by rail and transloaded to shipping containers for distribution around the world;
  - an auto compound to receive by rail North American-made automobiles destined for local distributors; and
  - a liquid energy transload and rail facility that would serve metro Vancouver's demand for transportation fuels and ethanol
- Dubbed the CP Logistics Park: Vancouver, the proposed facility is in the early stages of design and is subject to regulatory approval prior to CP's final investment decision.
- The project will ensure critical infrastructure is in place in Vancouver's largest trade gateway to meet current and future demands of the Canadian economy, as well as help strengthen the link between Canada's farmers and markets in Asia, CP officials said in a press release.
- Later this month, CP will solicit public comments on the proposed facility. CP officials already have begun gathering input from First Nations. The facility would be within the Katzie First Nation Traditional Territory.

## November Rail Traffic 'Making Up Lost Ground'

- In November, U.S. rail traffic "continued to make up lost ground," with U.S. intermodal volumes at "near record highs" for the second consecutive month, Association of American Railroads (AAR) Senior Vice President John T. Gray reported on Dec. 2.
- Intermodal growth—driven by import volumes and internet purchasing by consumers, Gray said—again offset carload declines. U.S. rail traffic for November—2,036,889 carloads and intermodal units—rose 3.1%, compared with November 2019.
- U.S. railroads originated 900,194 carloads in November 2020, down 5.8%, or 55,198 carloads, from November 2019. They also originated 1,136,695 containers and trailers, up 11.5%, or 116,915 units, from the same month last year.

## Brakes, maintenance: Toughest 15 states

As a share of all violations



## MAINTENANCE VIOLATIONS

**Texas - 90.1%**  
 California - 87.2%  
**Mississippi - 82.4%**  
**Virginia - 80.3%**  
**Montana - 78.8%**  
**Kentucky - 78.1%**  
 Alabama - 75.8%  
 Florida - 75.6%  
**Maine - 75.5%**  
 New Jersey - 75.3%  
**Missouri - 75.2%**  
**North Dakota - 74%**  
 Maryland - 74.4%  
 North Carolina - 74.3%  
 Nevada - 72.9%

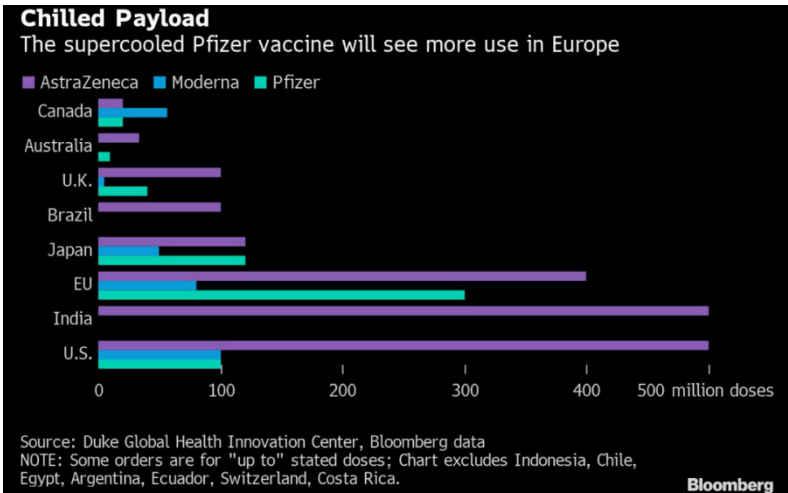
## BRAKES

*Overdrive*

**Virginia - 25.6%**  
**North Dakota - 25.1%**  
**Texas - 22.6%**  
**Missouri - 22.3%**  
**Montana - 22.1%**  
 Idaho - 18.8%  
**Kentucky - 17.8%**  
**Mississippi - 16.8%**  
 Utah - 16.6%  
 Wyoming - 15.3%  
 Oklahoma - 15.2%  
 Arkansas - 15.1%  
 Louisiana - 15%  
**Maine - 15%**  
 Wisconsin - 15%

## Airlines Face 'Mission of the Century' in Shipping Vaccines

- Laid low by a COVID-19 outbreak that's decimated passenger demand, airlines will be the workhorses of the attempt to eradicate it, hauling billions of vials to every corner of the globe. It's an unprecedented task, made more difficult by the carriers' diminished state after culling jobs, routes and aircraft to survive a crisis that's reduced air traffic globally by an estimated 61% this year.
- "This will be the largest and most complex logistical exercise ever," said IATA, "The world is counting on us." **Bloomberg**



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## Container shipping: Transshipment Ports see an Increase in October Cargo Rollovers



- Strong demand for container shipping space on major trade lanes from Asia to Europe and North America saw cargo rollovers increase month-on-month in October as carriers struggled to keep ocean supply chains operating smoothly.
- Overall container rollover ratios at leading transshipment ports rose to 28.5% last month, up from 26.9% in September and 22.2% in October 2019, according to Ocean Insights.
- “This is supposed to be container shipping’s seasonal lull after the summer peak season, but on some trade lanes freight rates are near record levels and ships are still departing Asia full,” said Josh Brazil, COO.
- “Container lines are trying their best to cope with critical box shortages in Asia, but this is putting more pressure on operations and freight rates. Carriers also no longer have the option of adding more vessels to boost capacity - almost the entire global fleet is currently active.
- “I think what we are seeing is that the cargo pipeline has maxed out ocean supply chain capacity and this is being reflected in heightened rollover levels which translates into more disruption for shippers and forwarders.”
- MSC’s rollover ratio as calculated by Ocean Insights rose to 23% last month from 16.2% in September, Maersk’s increased to 35% 33% in September, while Hapag-Lloyd’s rollover ratio crept up to 37.7% in October up from 34.2% a month earlier.
- COSCO’s ratio increased to 26% last month from 24% in September, ONE’s ratio rose to 39%, while Evergreen’s was 32%.

### Transshipment rollover ratio by port 2020

Port(s)	September	October	Change
Hamburg Sud Germany	29.1 %	24.7 %	-4.4 %
Singapore	30.2 %	31.1 %	+0.9 %
Tanjung Pelepas Malaysia	22.7 %	24.6 %	+1.9 %
Kaohsiung Taiwan	23.2 %	29.4 %	+6.2 %
Ningbo-Zhoushan China	30.1 %	43.5 %	+13.4 %
Hong Kong	24.6 %	23.9 %	-0.7 %
Port Klang Malaysia	28.9 %	27.9 %	-1.0 %
Jebel Ali Dubai	31.8 %	27.6 %	-4.2 %
Shanghai	25.5 %	22.8 %	-2.7 %
Busan Port South Korea	30.4 %	27.1 %	-3.3 %

www.ocean-insights.com

© Ocean Insights GmbH

### Rollover ratio by leading container lines 2020

Line	September	October	Change
MSC	16.2 %	22.9 %	+6.7 %
Maersk	32.9 %	35.1 %	+2.2 %
Hapag-Lloyd	34.2 %	37.7 %	+3.5 %
COSCO	23.7 %	26.4 %	+2.7 %
ONE	38.9 %	39.3 %	+0.4 %
Evergreen	25.9 %	31.8 %	+5.9 %
CMA CGM	40.6 %	31.4 %	-9.2 %

www.ocean-insights.com

© Ocean Insights GmbH





## Coronavirus impact on Seafarers could lead to many quitting the industry

- Maritime Professionals' Union, Nautilus International has stepped up efforts to end the Covid-19 crew change crisis as research shows nearly 90% of British seafarers have been affected by the pandemic and one in two is now considering their future in the industry.
- Nautilus is calling for governments and industry to work together to facilitate as many crew changes as possible throughout December to 'deliver seafarers home for Christmas', as some crew members face a second Christmas away from home.
- On December 1, the Union will launch a new petition, calling on governments and the United Nations to work together to ensure that seafarers are designated as key workers in every country, and allow global crew changes to take place.
- An estimated 400,000 seafarers from across the globe are now stranded on ships, continuing to work but unable to be relieved, in a crew change crisis which threatens trade and maritime safety.

## Cape Town port beacon of hope in uncertain times

- During the past season, logistics, and in particular the functioning of the main ports from where we ship our fruit, have been a huge headache during the initial and further lockdown levels in South Africa and abroad. There has, however, been great improvement in the SA ports since the excessive delays experienced earlier this year.
- Frequent reports will be distributed to all industry stakeholder to keep everyone informed of the situation in the ports and any potential problems that might arise. The expectation from Transnet is for the industry to keep them updated about the progression of the season and potential bottlenecks that may develop.
- Additional straddle carriers, rubber-tyred gantries and gangs have already been commissioned. Attention is also given to the reefer plug-in points. The new equipment is able to operate at higher wind speeds. There seems to be a real desire from Transnet to improve port efficiency and to deliver a much-improved service. We are cautiously optimistic and excited that the Cape Town port will operate at its best level in many years this coming season.





## Waterfront Shipping Orders Eight More Methanol-Powered Tankers

- Vancouver, British Columbia-based Waterfront Shipping has placed an order for eight new methanol-fueled tankers to be built at Hyundai Mipo Dockyard in South Korea.
- The use of methanol fuel has been found to reduced in-sector CO2 emissions by up to 15% when compared to conventional marine fuels. It also complies with existing low sulphur fuel regulations and meets IMO Tier III NOx emissions standards.
- The vessels will join Waterfront's existing fleet of 11 methanol-powered ships ranging in size from 3,000 to 50,000 deadweight tonnes, making the company the world leader in methanol-powered ships. Waterfront Shipping Company is a wholly-owned subsidiary of Methanex Corporation.



## Containership ONE Apus Loses 'Significant' Number of Containers Overboard in Pacific

- An Ocean Network Express containership has lost a "significant" number of containers overboard in the Pacific Ocean approximately 1,600 nautical miles northwest of Hawaii, the ship's manager has reported.
- NYK Shipmanagement Pte Ltd said the containers were lost overboard during severe weather as the vessel was underway from Yantian, China to Long Beach, California. During the voyage, the vessel encounter a storm cell producing gale-force winds and large swells, causing the ship to roll heavily and resulting in the containers dislodging and falling into the ocean, the company said.
- According to an update, it is estimated that number of lost or damaged containers could be more than 1,900, including 40 that are believed to be dangerous goods. The exact number won't be known for some time.
- The owners and managers are now reporting that the ship will sail towards Japan with plans to seek a port of refuge to right unstable containers, assess any damages, and determine the exact number of containers impacted.



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## Beyond the Mega-Ship Revolution

- Mega-ships are not new to the container shipping industry however this year saw records broken with the largest vessels ever to take to the seas entering the global fleet.
- The events of 2020 have not discouraged carriers from investing in mega-ships and many have been inaugurated throughout the year. South Korean container shipping line HMM completed its fleet of mega-ships with the unveiling of the 24,000 TEU HMM St Petersburg in September, with the HMM Algeciras first of the new Algeciras-class taking to the ocean in April. Meanwhile, CMA CGM launched the first of 26 new generation Liquified Natural Gas (LNG)-powered container ships, the CMA CGM Jacques Saade. The first nine of the fleet will have a capacity of 23,000 TEU, the rest of the LNG-powered vessels will be of various sizes and join the fleet by 2022.
- It was feared that the impact of the COVID-19 pandemic could quash carrier's appetite for these larger vessels and while it may be the case that large orders are being put on hold temporarily, these 20,000+ TEU vessels will continue to be brought into the fleet well into the future.

## OOCL to levy US West Coast surcharge, citing congestion

The Los Angeles-Long Beach port complex has experienced the greatest amount of congestion, owing to record imports from Asia that began over the summer when initial COVID-19-related lockdowns were eased.

## GCT receives two 14,000 TEU-ready STS cranes

- Global Container Terminals (GCT) has received two capable ship-to-shore (STS) cranes at GCT Vanterm in Inlet in the Vancouver Harbour.
- The company said the STS cranes travelled approximately 9,200 km nautical miles from Shanghai, the two cranes passed safely under the Lions Gate Bridge earlier this week and arrived at GCT Vanterm.
- This announcement is part of GCT's previously announced \$160M private sector investment to modernize and densify operations at GCT Vanterm.



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## ZPMC predicts pandemic recovery will accelerate automation



- ZPMC, the world's largest manufacturer of container handling equipment, has said the COVID-19 pandemic will accelerate the pace of automation investment and implementation in port and terminal operations.
- Speaking to PTI ahead of CTAC 2020, Sun Fei said the pandemic had made the industry "better understand" the value of new technologies, and that automated terminals had demonstrated their resiliency during 2020.
- Fei attributed the success of automated terminals to the utilization of remote technology, which made it easier to socially distance and maintain efficiency levels during national lockdowns.
- Manual terminals, Fei explained, are at a distinct disadvantage and continuing to use them was untenable in a connected and more demanding supply chain.

## Walmart breaks ground on Port of Charleston distribution hub



- Walmart has broken ground on a three million square foot import distribution centre near the Port of Charleston, according to a statement from the South Carolina Ports (SC Ports).
- The Walmart Ridgeville Import Distribution Center will supply several regional distribution centres, which will support approximately 850 Walmart and Sam's Club stores across South Carolina and beyond.
- Once fully operational, the distribution centre is expected to increase volumes at the Port of Charleston by 5%.

## Port of Gothenburg looks to solve empty container deficit



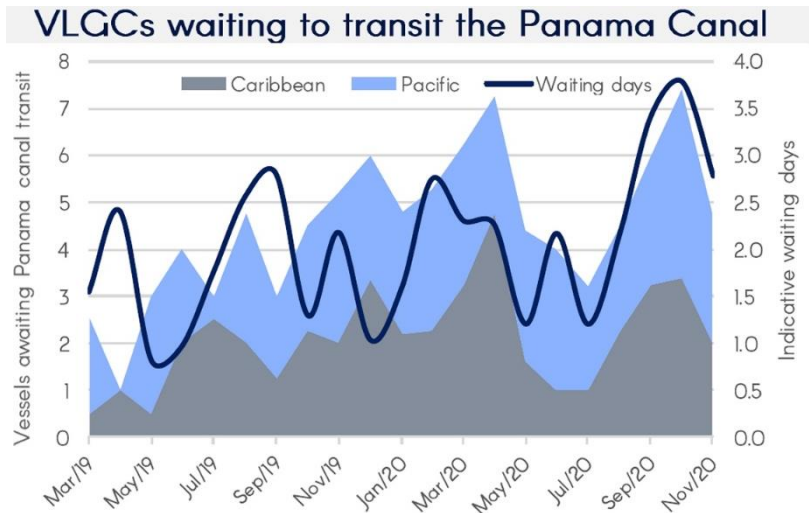
- To mitigate the empty container deficit at the Port of Gothenburg, the port community is launching an "Empty Container Initiative" campaign, aimed to support container storage during the holiday seasons, from today lasting through January.
- This comes as COVID-19 continues to affect the world and global trade. Right now, Port of Gothenburg customers are experiencing a sudden deficit of empty containers for export cargo, while at the same time Purchasing Managers Index (PMI) account that Swedish export is booming, the Port said in a statement.
- With more than 50% of the total Swedish container traffic, the container balance at the Port of Gothenburg is almost 50-50 between import and export. This fact also brings fast container turnaround times.





## How the Panama Canal traffic jam is affecting ocean shipping **American Shipper**

- Since the Panama Canal debuted its larger Neopanamax locks in 2016, the three heaviest users have been container ships, liquified natural gas (LNG) carriers and liquefied petroleum gas (LPG) carriers. Now, transit demand for all three segments is simultaneously surging. On top of that, COVID issues are reportedly affecting canal operations.
- The consequence over the past month and a half: transit delays.
- The good news for containerized cargo shippers is that container lines have reserved booking slots. The delays are affecting ships without reservations.
- Asked about causes of congestion, Panama Canal Authority (ACP) cited a confluence of higher container traffic and LNG traffic. “Like at many ports around the world, we see this as a temporary situation driven by the effects of the pandemic [on consumer demand].”
- The ACP also blamed the weather. “Hurricanes ... delayed shipments that then arrived at the Panama Canal simultaneously,” it said. It added that Panama is at the end of its rainy season “and there have been more days with seasonal fog than last year.”
- The ACP asserted that its operational adjustments have now reduced delays. “The waiting time for vessels without reservations is five to six days on average, down from 10 days in mid-October,” it reported.
- According to Cleaves Securities, “Our satellite data shows that eight VLGCs [were] awaiting Panama Canal transit as of Monday morning, with an average waiting time of around 2.8 days. This is down from the 3.8-day average in October, but up from the 1.7-day average between May and August.”
- “With some vessels now using up to nine days to transit the canal — normally around two days — many opt for the 12-day-longer voyage around the Cape of Good Hope,” said Cleaves.





## New COVID-19 restrictions could permanently close a third of US restaurants



The National Restaurant Association has highlighted the restaurant industry's sales decline in October, the first since the industry started recovering from the blow of initial pandemic shutdowns. Tom Bene, the head of the group, wrote a letter to the National Governor's Association last week saying, "We continue to support aggressive steps to protect the nation's public health. But there is an unfounded impression that restaurants are part of the problem, and we are suffering as a result of inconsistent, restrictive mandates."

## European Commission reverses course, says CBD should not be regulated as a narcotic



Makers of CBD foods and supplements no longer face the prospect of a blanket ban in Europe after the European Commission revised its preliminary stance that CBD should be treated as a narcotic.

## Biden calls for grants to support restaurant industry

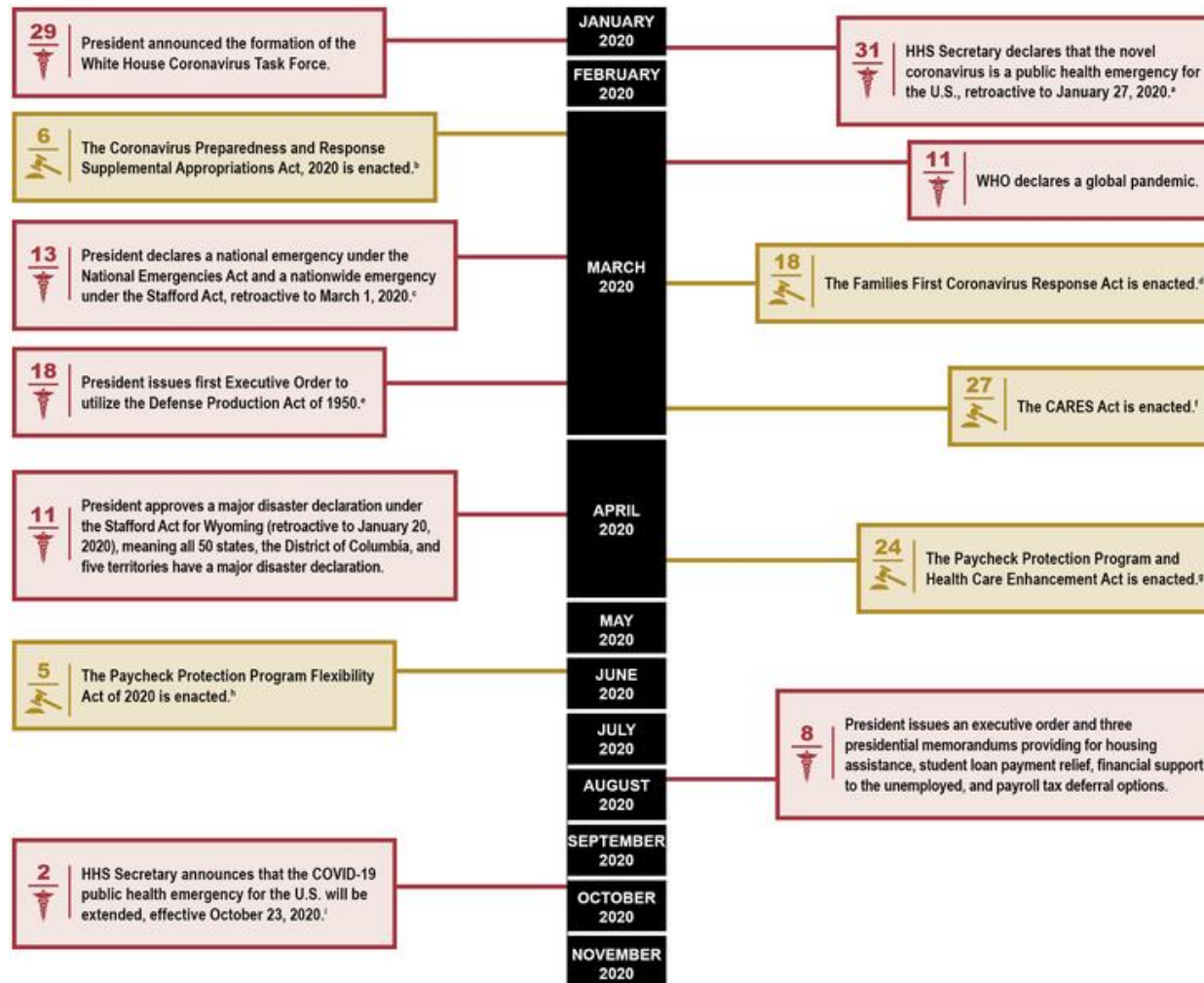


- President-elect Joe Biden expressed his support for providing restaurants with grants instead of loans during an economic roundtable, stating that the restaurant industry "affects the ability of the economy to continue to grow."
- Restaurateur and Independent Restaurant Coalition member Dan Jacobs, the only small business owner on the panel, asked the president-elect to back the Restaurants Act and said that Payment Protection Program loans have not been enough to financially support restaurants amid the pandemic, especially since funding for many restaurants has run out.
- The Restaurants Act is co-sponsored by Vice President-elect Kamala Harris and passed the House of Representatives but has been slow to gain traction in the Republican Senate. On Monday, however, Sen. Patty Murray (D-Wash) became the 49th senator to sign the bill, putting roughly half of the chamber in support of the proposed legislation. The bill would establish a \$120 billion grant fund to support restaurants and bars.
- Biden's support for direct aid to restaurants is no small statement, especially as the industry continues to push for specific aid. The industry wasn't a topic of discussion during the presidential debates, either, and isn't mentioned on the Biden-Harris transition plan website. Another Biden campaign promise affecting the restaurant industry calls for ending the tip credit and raising minimum wage to \$15 — controversial among the restaurant community.



# Healthcare Update

28



Legend: HHS = Department of Health and Human Services; Stafford Act = Robert T. Stafford Disaster Relief and Emergency Assistance Act; WHO = World Health Organization.



Federal legislation enacted



Declaration/guidance/announcement

Source: GAO analysis of legislation and executive branch data. | GAO-21-191

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## Who Will Be In First Wave Of COVID Shots? **KHN**

KAISER HEALTH NEWS

- With the Food and Drug Administration set to evaluate the two COVID-19 vaccine candidates in the coming weeks -- good news for a country fatigued by what seems to be a never-ending pandemic -- who will get the first doses?
- The committee that decides who gets the coronavirus vaccine first meets virtually December 1<sup>st</sup> as officials prepare for distribution that could potentially come within two weeks. Look for discussion of two questions: Where should people in long-term care facilities be in the vaccine line and the power of states and governors to shift priorities for who gets immunized first. The Advisory Committee on Immunization Practices is an independent group convened by the Centers for Disease Control and Prevention to offer advice on who should get specific vaccines and when.

## California calls for weekly testing of all hospital workers **BECKER'S HOSPITAL REVIEW**

BECKER'S  
**HOSPITAL REVIEW**

- The California Department of Public Health has released new COVID-19 testing guidance stipulating that workers at acute care hospitals be tested weekly.
- The guidance, announced in an all-facilities letter dated Nov. 25, also calls for acute care hospitals to test all patients before admission and immediately test symptomatic healthcare workers.
- Under California's new regulations, acute care hospitals must begin testing workers considered to be at high risk of contracting COVID-19, such as emergency room and intensive care unit workers, by the week of Dec. 7, according to the union, which represents more than 15,000 healthcare workers in California.

## In World First, UK Approves Pfizer's COVID-19 Vaccine **REUTERS**

 **REUTERS**

- Britain approved Pfizer's COVID-19 vaccine on Dec 1<sup>st</sup>, jumping ahead of the rest of the world in the race to begin the most crucial mass inoculation programme in history with a shot tested in wide-scale clinical trials.
- Prime Minister Boris Johnson touted the greenlight from the UK's medicine authority as a global win and a ray of hope amid a pandemic, though he recognised the logistical challenges of vaccinating an entire country of 67 million.
- Britain's move raised hopes that tide could soon turn against a virus which has killed nearly 1.5 million people, hammered the world economy and upended normal life for billions. Britain's Medicines and Healthcare products Regulatory Agency (MHRA) granted emergency use approval to the Pfizer-BioNTech vaccine.

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## It's Not Just Hospitals: 911 Emergency Systems, Testing Labs Overwhelmed



- COVID-19 is straining most aspects of the American health care system.
- The 911 emergency call system is stretched to "the breaking point," the American Ambulance Association says.
- Ambulance services are critical in getting sick patients to hospitals for care, and the American Ambulance Association, which represents all of the nation's ambulance services, said they are struggling to stay together.
- Labs took an average of just under three days to process the nearly 900,000 COVID-19 tests performed in Michigan over the last two weeks, according to data the state began posting publicly last week. It's the clearest look so far at how long it's taking each provider, from massive commercial labs in California to small strip mall urgent cares, to go from collecting a sample to the results being logged by the Michigan Department of Health and Human Services.

## Mercy to use virtual care at home for some COVID-19 patients

- COVID-19 infection rates and hospitalizations in Arkansas continue to rise. To address the anticipated capacity shortage, Mercy Health is expanding its virtual health program to offer patient care at home in Northwest Arkansas and the Fort Smith region.
- Mercy COVID Care @ Home will offer remote, in-home care for patients with mild symptoms who may need low-flow rates of oxygen, by providing virtual home monitoring in real-time. It is 24-hour care that will include measurement of oxygen saturations by pulse oximetry, adjusting oxygen flow as necessary, along with additional evaluations and appropriate interventions.

## Walgreens and VillageMD to Open the Next 40 Full-Service Primary Care Clinics

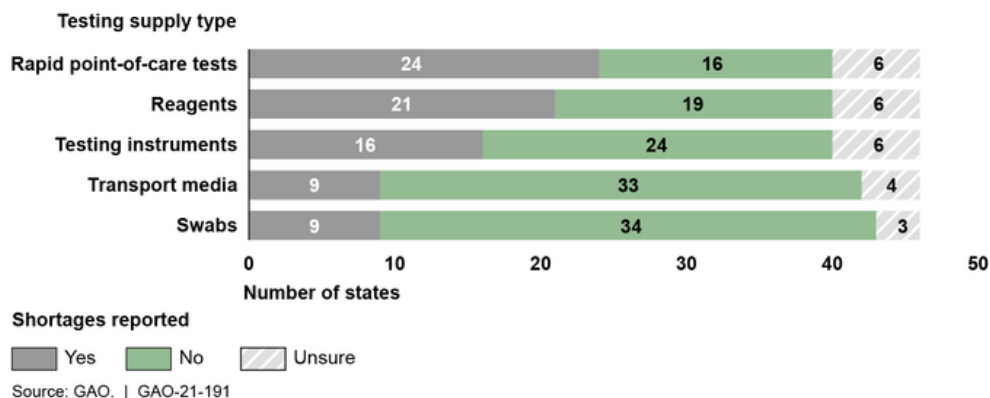





Walgreens Boots Alliance and VillageMD today announced plans to open the next 40 new Village Medical at Walgreens full-service primary care clinics by the end of summer 2021. The first new locations outside of Houston will open in the Phoenix area starting Dec. 14, 2020. The expansion is part of the large-scale rollout announced earlier this year to open 500 to 700 Village Medical at Walgreens clinics in more than 30 U.S. markets in the next five years. The new openings integrate pharmacists as critical members of VillageMD's physician-led, multidisciplinary team to provide patients with a full suite of primary care and pharmacy services at convenient Walgreens neighborhood locations.



## Some states worried about inadequate supplies to give COVID-19 vaccine, GAO says BECKER'S HOSPITAL REVIEW

- One-third of states said they are "greatly" or "completely" worried they won't have enough supplies to administer COVID-19 vaccines when they are approved, according to a report released by the U.S. GAO.
- Another 21 states reported they are "moderately" concerned they won't have adequate supplies to administer COVID-19 vaccines.
- The GAO report urged federal action to meet states' needs for scarce supplies and to increase transparency in COVID-19 testing guidance. And HHS should make sure that the scientific reasons for any changes to testing guidelines are publicized in a timely manner, the report stated.
- Shortages of medical supplies persist despite the efforts of HHS and the Federal Emergency Management Agency, the GAO said. One-third of states have reported a lack of testing supplies, such as rapid point-of-care tests, chemicals and instruments used in testing.
- Certain types of personal protective equipment, including nitrile gloves, are also still in short supply, but most states reported they were able to fulfill most requests for PPE.



Description	
TYPE OF TESTING APPROACH	<b>Diagnostic</b>  Intended to identify occurrence at the individual level and is performed when there is a reason to suspect that an individual may be infected, such as having symptoms or suspected recent exposure, or to determine resolution of infection.
	<b>Screening</b>  Intended to identify occurrence at the individual level even if there is no reason to suspect infection—e.g., there is no known exposure. This includes, but is not limited to, screening of non-symptomatic individuals without known exposure with the intent of making decisions based on the test results.
	<b>Surveillance</b>  Includes ongoing systematic activities, including collection, analysis, and interpretation of health-related data that are essential to planning, implementing, and evaluating public health practice and monitoring of community- or population-level occurrence.

Source: GAO analysis of Department of Health and Human Services documentation. | GAO-21-191



### World's 1st zero-emission container vessel, Yara Birkeland, delivered



- The zero-emission container vessel Yara Birkeland was delivered to its owner Yara International, Norway-based shipbuilder Vard informed.
- Upon delivery, the vessel is scheduled to undergo testing for container loading and stability, before it sets sail to a port and test area in Horten for further preparations for autonomous operation.
- The ship had been announced by Yara and technology company Kongsberg back in 2017 as the world's first fully-electric container feeder, which will produce zero emissions.
- Under the partnership, Kongsberg was in charge of development and delivery of all key enabling technologies on Yara Birkeland including the sensors and integration required for remote and autonomous operations, in addition to the electric drive, battery and propulsion control systems.
- Yara Birkeland features 80 meters in length, 15 meters in width, and can accommodate 120 standard 20-foot containers (TEU). The vessel is planned to ship products from Yara's Porsgrunn production plant to Brevik and Larvik in Norway, helping move transport from road to sea and thereby reducing noise and dust, NOx and Co2 emissions.



### Volvo's New VNR Electric Brings Zero-Emission Semis To North America **Forbes**

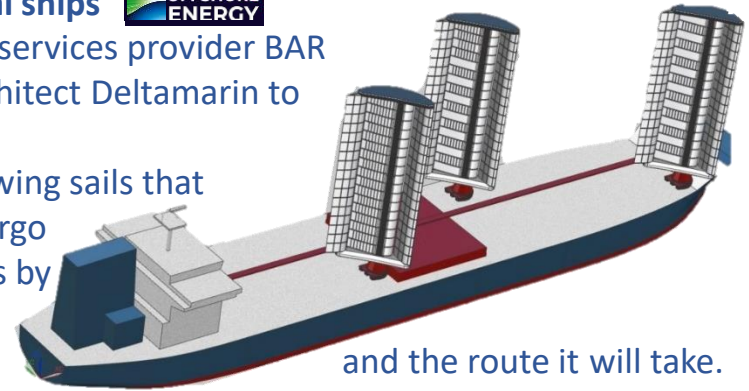
- Electric trucking just got one step - actually, 150 miles - closer to reality today as Volvo Trucks NA announced it is starting commercial sales of its battery-powered, Class 8 Volvo VNR Electric truck. The large EV will be built alongside diesel semi tractors at Volvo Trucks' New River Valley assembly plant in Dublin, Virginia starting in early 2021.
- Available in a number of different configurations, the VNR Electric is "a milestone for Volvo Trucks North America, and the entire industry," said Volvo Trucks North America president Peter Voorhoeve. Meant to offer local and regional delivery companies a zero-emission option - one that will also be quieter and easier to operate for their drivers - each VNR Electric comes with a new service called Volvo Gold Contract. This Gold Contract is designed to make it easy for fleet managers to take the leap into electromobility, covering scheduled and preventative maintenance, towing and vehicle repair, including any issues with the lithium-ion batteries.



## Cargill, BAR Technologies to deliver wind sail solution for commercial ships



- Food corporation Cargill and design and engineering consultancy services provider BAR Technologies have embarked on a strategic project with naval architect Deltamarin to bring wind propulsion technology to commercial shipping.
- the project will see BAR Technologies' WindWings — large, solid wing sails that measure up to 45 meters in height — fitted to the deck of bulk cargo ships to harness the power of the wind and reduce CO2 emissions by as much as 30 per cent.
- The number of wing sails can be tailored to the size of the vessel and the route it will take.
- BAR Technologies — a spin-off from Ben Ainslie Racing (BAR), the British team formed by Olympic and World Champion sailor Sir Ben Ainslie — was formed in 2016, making the design knowledge, technical skills and intellectual property developed for America's Cup yacht racing available for the commercial world.



## Tractebel develops new floating wind, large-scale hydrogen production platforms



- Tractebel Overdick has developed a new floating wind foundation concept for 15+ MW wind turbines with a “hydrogen ready” option, and an offshore hydrogen production platform which can utilize the potential of large-scale offshore wind farms at an industrial scale of up to 800 MW.
- The new floater design is said to have been optimized to reduce the overall costs of the floating foundation, through all major fabrication, installation, and operational aspects.
- In the case of the hydrogen platform, the company has also highlighted that the new design – for which the system configuration and platform layout have been optimized based on the company's previous design for a 400 MW system – can now lead to an overall cost reduction and competitive levelized cost of hydrogen.







## E-scooters: The impact legalization would have in the UK

It is currently illegal to ride e-scooters in public spaces in the UK, but this has not stopped riders appearing on roads and pavements. An upcoming national consultation means it is a good time to consider the implications of e-scooters coming to UK streets.

## Hyundai scooter prototype to woo last-mile city riders

- If the active and the restless in cities today want to go places as efficiently and emissions free as possible, then we can see why there are such warm fuzzies around the concept of the last-mile scooter. Transportation-watcher Sebastian Blanco in Forbes said one can always be ready to go "after you drive as close as you can to your destination and scoot the rest of the way."
- A video titled "Last mile mobility for the future, Hyundai-Kia 'Vehicle-mounted electric scooter' revealed" shows a cartoon rendering of a red car pulling up with a scooter neatly tucked away. The model fixes her smartphone to the scooter and she's off.
- Yes, this is a prototype. The scooter has a digital display that shows its battery status and speed. Riding at night? The scooter has two front headlights and two rear tail lamps.



## 11 Different Sources of Alternative Energy



(i) Hydrogen Gas, (ii) Tidal Energy, (iii) Biomass Energy, (iv) Wind Energy, (v) Geothermal Power, (vi) Natural Gas, (vii) Biofuels, (viii) Wave Energy, (ix) Hydroelectric Energy, (x) Nuclear Power and (xi) Solar Power.

- As the issues that result from the use of traditional fossil fuels become more prominent, alternative fuel sources like the ones mentioned here are likely to gain further importance.
- Their benefits alleviate many of the problems caused by fossil fuel use, particularly when it comes to emissions. However, the advancement of some of these technologies has been slowed down due to the amount of investment needed to make them viable.

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INVESTING IN THE  
**E-COMMERCE FUTURE**

Online shopping has become the new normal.

From what was once a small afterthought for retailers to the predominant method of consumption, e-commerce has grown into a multi trillion-dollar market that's slated to keep growing.

2023e **\$6.5 trillion**

2018 **\$3.0 trillion**

Total Global Retail E-Commerce Sales

## E-COMMERCE ACROSS CONSUMER SECTORS

Heading into 2020, the e-commerce shift was already affecting multiple sectors outside of traditional retail. In a COVID world, however, that digitization has increased exponentially.

### GROCERIES

Home delivery for groceries and meal-kits were already gaining in popularity before the pandemic, but found a massive new audience once lockdowns began.

Walmart\* SAFeway  
Instacart Blue Apron

### RETAIL

The scale and functionality of e-commerce retail are growing, with increasingly generous online sales, return options, and more high-end companies entering the mix.

amazon overstock  
Alibaba Group wayfair

### ADVERTISING

An increasingly online populace is more susceptible to digital advertising than traditional formats, and retailers are taking notice that their bang-for-buck in advertising dollars is going further in online spaces.

Google facebook snapchat

### FOOD DELIVERY

App-based restaurant orders have skyrocketed, both delivery and take-out. After COVID-19, most reluctant restaurants have embraced the model.

Uber Eats  
DOORDASH

One key marker signifying the e-commerce boom has been the rise of digital marketplaces.

In 2019, online marketplaces accounted for 57% of global online retail sales.

### SERVICE

Boardroom meetings, healthcare, guided maintenance, and virtual chat assistance are becoming as ubiquitous as streaming media services due to social distancing restrictions.

PELOTON NETFLIX  
ZOOM Spotify

### World's Largest Online Marketplaces by Goods Sold 2019

Source: DigitalCommerce360

Marketplace	Goods Sold (2019)
ebay	\$90B
JD.COM	\$299B
amazon	\$339B
天猫 THAILCOM	\$458B
淘宝网	\$484B

E-commerce was already trending upwards before 2020. COVID-19 was the catalyst for explosive growth. The forced shift of retail (and business) to the digital world has increased the rate of e-commerce adoption exponentially.

### E-commerce Share of Total U.S. Retail Sales 2010-2020

Source: Statista

Year	Share (%)
2010	4.0
2012	5.0
2014	6.0
2016	7.0
2018	8.0
2020 (Q2)	16.1

How can investors take part in the increasingly growing world of e-commerce?

By knowing where the imminent digital shift is already taking place, or where the barriers to entry are set to be removed.

- ### 1 NEW INDUSTRIES EMBRACING E-COMMERCE

From increased shares and channels of digital commerce to more retail sectors taking advantage of the e-commerce boom, more companies are expected to take their competition digitally.

WHAT TO WATCH

  - B2C and private-label selling
  - Digitized learning, healthcare, professional services
  - New digital health/wellness channels
- ### 2 NEW TECH REMOVING BARRIERS TO DIGITAL CONSUMPTION

Some of the most important aspects of physical shopping for consumers, including touch, measurement, and ease of return, are being addressed by new and streamlined technology that will enable 100% online shopping.

WHAT TO WATCH

  - AR/VR product testing
  - Blockchain and payment security
  - Drone delivery
  - Chatbots, voice assistants, and AI

Will we ever reach 100% online shopping?  
The rising wave of e-commerce is quickly enabling that possibility.

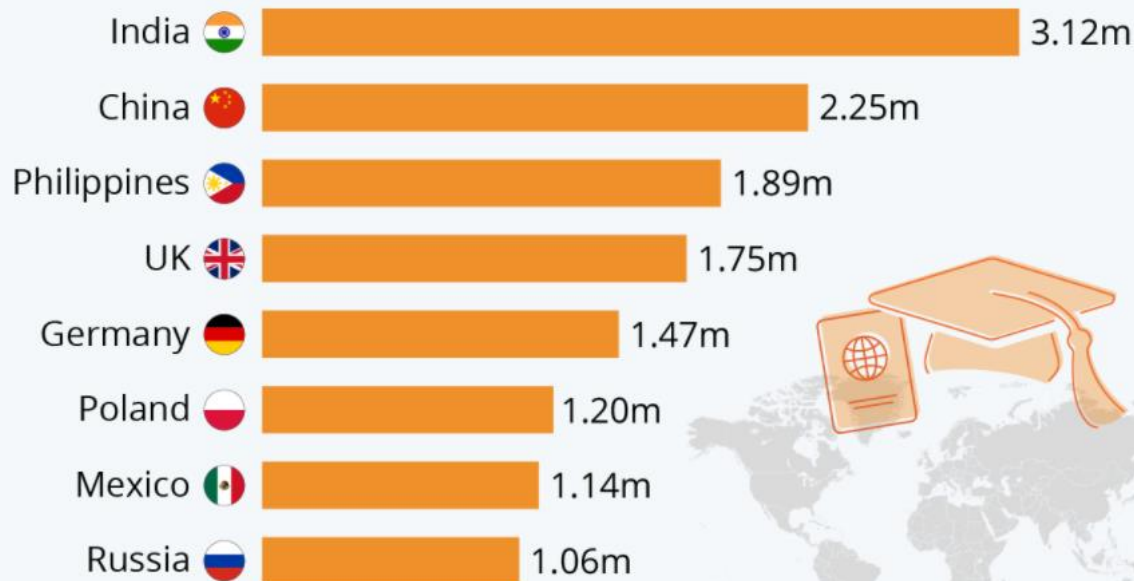






## Where Highly Educated Migrants Come From

Most common birth countries of highly educated\* migrants residing in OECD nations



\* Having received vocational or academic training

As of 2015/16 - latest available

Source: OECD



statista