

Container imports to surge ahead of strike, tariffs, NRF predicts

Retail organization's Port Tracker sees frontloading by importers

[Stuart Chirls](#)

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(Photo: National Retail Federation)

Containerized imports are expected to continue to surge through U.S. ports into the new year as shippers look to beat a possible strike by East and Gulf Coast longshore workers and planned tariffs by the incoming Trump administration, according to a new forecast.

October volume totaled 2.25 million twenty-foot equivalent unit through ports covered by the Global Port Tracker. That was off by 1.2% from September but ahead 9.3% from October 2023.

The data did not include the Port of Miami, which has yet to report October volumes. The Port Tracker is produced by the NRF and Hackett Associates. The trade group counts Walmart, Macy's, Target, Microsoft and Levi Strauss among its members.

"Either a strike or new tariffs would be a blow to the economy and retailers are doing what they can to avoid the impact of either for as long as they can," NRF Vice President for Supply Chain and Customs Policy Jonathan Gold said in a release. "We hope that both can be avoided, but bringing in cargo early is a prudent step to mitigate the impact on our industry, consumers and the nation's economy."

The trade group called on East and Gulf Coast port employers and the International Longshoremen's Association to return to contract negotiations. It also urged President-elect Donald Trump to strategically deploy tariffs rather than take the broad-based approach he threatened on the campaign trail, which it said would negatively impact the prices of everyday consumer goods.

An ILA spokesman on Monday told FreightWaves "there was nothing to report" on a resumption of contract talks. The United States Maritime Alliance representing port employers did not immediately respond to an email seeking comment.

November imports, which have yet to be reported, are projected at 2.17 million TEUs, up 14.4% y/y. December is forecast at 2.14 million TEUs, up 14.3% y/y, for a total of 25.6 million TEUs in 2024, an increase of 14.8% from 2023.

November port traffic had been forecast at 1.91 million TEUs and December at 1.88 million TEUs prior to the October longshore strike and November election, and volume of 24.9 million TEUs was projected for all of 2024.

The surge was corroborated on Monday by the Association of American Railroads, which said intermodal container volume [set three weekly records](#) in November.

Heading into the new year, January is forecast at 2.2 million TEUs, up 12% y/y; February at 1.87 million TEUs, down 4.1% due to fluctuations in the timing of Lunar New Year shutdowns at Asian factories; March at 2.17 million TEUs, up 12.7%; and April at 2.15 million TEUs, up 6.6%.

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