REGIONAL PULSE

A Member-Driven View of the Global Moving Industry

2nd Edition

An Initiative of the **IAM Core Members Management Board**

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What Exactly Is "Normal"?

IAM members don't need another report telling them costs are rising, customers are watching their budgets, technology is changing, and the world is uncertain. They encounter those realities every day. What is harder to see from inside one company is whether other movers are experiencing the same pressures, and what that shared experience means for your next business decision.

Consider shipment volume. A company can complete the same number of moves while shipping less with each one. An employer can continue relocating staff while reducing relocation allowances. Customers can still move overseas while leaving behind possessions that, ten years ago, might have filled a 40-foot container.

Each may look like a disappointing season. Taken together, they raise a harder question: does the business model that worked ten years ago still fit today's market? And what do companies risk by waiting for conditions to return to "normal"?

For a mover experiencing these pressures, knowing that others share them provides useful context. It also creates a reason to examine whether the company's strategy reflects the market it serves today or the one it remembers.

Payment brings the pressure into sharper focus. The work is completed, the crew and transportation costs are paid, and the trading partner has yet to settle the invoice. Until payment arrives, the company that performed the service is financing the company that requested it.

As margins tighten, IAM's Oceania regional representatives warn that movers have less capacity to carry another business for 90 or 120 days. They anticipate more formal disputes, even between long-standing partners, as the financial room to wait shrinks. Bookers need to recognize the financial strain late payments place on their service providers and honor agreed payment terms.

The second Regional Pulse Report combines region-specific member surveys developed by the Core Members Management Board (CMMB) with its representatives' professional experience and observations. The figures document respondents' experiences; the named voices explain how those pressures play out inside a business. Together, they give members evidence to use in business conversations and a clearer basis for deciding which assumptions still hold, and which deserve another look.

How This Report Was Built

The Second Regional Pulse Report draws on voluntary survey responses collected in Q3 2026 from 280 member respondents across seven regions, alongside professional observations from the Core Members Management Board (CMMB) representatives.

Representatives developed market-specific questions and provided commentary, including observations made after the surveys closed. Their commentary is attributed separately from the survey findings. Because regional questionnaires differ, do not read the results as a regional ranking. References to the **first report** provide context rather than a measured change among the same companies.

What the Survey Results Reveal

Pressure on price and service

The second Regional Pulse Report examines both the costs of delivering a move and the pressure on what customers are willing to pay.

In **Central**, **South America & the Caribbean**, **87%** of respondents identified price as one of the factors that most influence customers when choosing an international mover. Reputation and trust also mattered, selected by **69%.**

Yet when asked about their company's strongest competitive advantage, only **4%** selected price competitiveness. **62%** selected service quality and specialized services, while **24%** selected customer experience.

For movers in this region, the findings point to a difficult balancing act: customers place considerable weight on price, while companies identify service and customer experience as their strongest advantages. Competitive pricing still needs to cover the cost of delivering that service.

The table below highlights two findings from each region, illustrating why no single measure tells the whole story of business health. Percentages reflect respondents to each regional survey. Because the questionnaires differed, the results are not directly comparable across regions.

Region	Selected finding	Additional Finding
Africa	**85%** rate faster, more responsive communication a very or extremely significant influence on operations	**85%** rate price-based competition a very or extremely significant challenge to the industry's reputation
Central, South America and the Caribbean	**87%** name price among the top influences on customer selection	**4%** name price as their own strongest competitive advantage
Eastern and Southeastern Asia	**42%** describe their business as improving	**68%** expect continued demand for lower-cost solutions
Europe	**51%** plan to invest in digitalization and automation	**8%** are very confident about recruiting and retaining operational staff
Middle East and Near Asia	**81%** report negative business impact from conflict and regional security concerns	**59%** pass increased costs on to customers fully or in most cases
North America	**53%** report higher outbound international volume	**54%** see clients shifting to lump-sum stipends
Oceania	**84%** expect flat or moderately lower activity	**68%** expect technology investment to increase

Africa

CMMB Representatives:
Charnel Francis *(AGS Worldwide Movers) &* ***Cosmas Kamuyu*** *(Nellions Moving And Relocations)*

Customers expect faster answers in a market pressing on price

85%	85%
Rated faster, more responsive communication as a very or extremely significant influence on how moving companies operate in their market.	Rated price-based competition rather than service quality as a very or extremely significant challenge to the industry's professional image and reputation.

BEHIND THE NUMBERS

A customer wants to know when a shipment will arrive. The answer may depend on a transport connection, customs documentation or information from a destination partner. Responding quickly is one task. Obtaining a dependable answer is another.

Charnel Francis describes infrastructure, transport connectivity, customs processes, and logistics costs as interconnected challenges. A delay in one part of the journey can create uncertainty and additional work elsewhere. The mover remains responsible for communicating with the customer while relying on processes outside its direct control.

The survey shows how strongly respondents feel the competing demands. **85%** rated faster, more responsive communication as a very significant influence on operations. Separately, **85%** gave price-based competition the same rating as a challenge to the industry's reputation. These findings highlight a commercial tension: companies must invest in the coordination customers expect while competing in a market where price matters most.

Respondents also identified poor service as a threat to the industry's reputation. **67%** rated damage or poor service caused by unprofessional movers as a very significant challenge. For reliable providers, the task extends beyond delivering their own service. They must help buyers understand what distinguishes that service before a shipment encounters a problem.

The regional representative calls for stronger collaboration to help movers address Africa's interconnected operational challenges. Sharing knowledge about customs requirements and transport conditions, maintaining dependable partnerships, and strengthening regional cooperation can help movers plan around disruptions and keep customers informed. Digital tools can support this work, but shipment updates are only useful when the information behind them is accurate.

Africa

CMMB Representatives:
Charnel Francis *(AGS Worldwide Movers) &* ***Cosmas Kamuyu*** *(Nellions Moving And Relocations)*

THREE QUESTIONS FOR YOUR BUSINESS

Pricing: Where does the cost of coordination and exception handling exceed what your quotation allows?

Partners: Which recurring information gaps or handover failures create the greatest delays and unrecovered costs?

Customer confidence: What evidence helps buyers assess service reliability before comparing prices?

Central, South America & The Caribbean

CMMB Representatives:
Carlos Avalos *(Sandhill Ecuador SAS) &* ***Daniel Rodrigues*** *(AIM Brazil)*

Additional Perspective:
Catherina Stier Neumeyer *(Harsch, The Art of Moving Forward)*

Price pressure meets a change in what customers move

87%	4%
Identified price among the factors most influencing customer selection.	Named price competitiveness as their company's strongest competitive advantage.

BEHIND THE NUMBERS

Carlos Avalos says price often begins the comparison, while trust, communication, and reliability remain important to the final decision. The survey reflects both considerations: **69%** identified reputation and trust among the factors influencing customer selection.

The challenge, in his assessment, is that greater price sensitivity has not brought a corresponding reduction in service expectations. Customers still expect reliable delivery and proactive communication, while many costs depend on freight, customs, and other conditions outside the mover's control. Demonstrating value remains important, but companies must also examine how efficiently they deliver it. Carlos also identifies AI and automation in quotations, communication, documentation, and shipment tracking as potential tools for improving efficiency while maintaining service quality.

Daniel Rodrigues describes a change in what customers choose to move. In his experience, younger transferees increasingly ship only the essentials, while some corporate clients have reduced relocation allowances compared with ten years ago. A relocation can still happen with a smaller shipment. He sees broader mobility services as one way moving companies are adapting to those needs.

The survey shows where respondents believe their strengths lie: **62%** named service quality and specialized services as their strongest competitive advantage; **24%** named customer experience. These findings raise a practical question: how can companies align those strengths with customers' changing budgets and preferences?

Customs procedures and port charges also recur in open responses. Carlos identifies more frequent regulatory updates and practical country guidance as useful areas for IAM support. He also suggests including RMC perspectives to better understand how mobility budgets and purchasing decisions shape demand.

Central, South America & The Caribbean

CMMB Representatives:
Carlos Avalos *(Sandhill Ecuador SAS) &* ***Daniel Rodrigues*** *(AIM Brazil)*

Additional Perspective:
Catherina Stier Neumeyer *(Harsch, The Art of Moving Forward)*

Catherina Stier Neumeyer, Chair of the CMMB, brings the discussion back to the assumptions behind business planning:

> *"I believe that seeing today's reality as temporary is holding many companies back from adapting and succeeding."*
>
> **- Catherina Stier Neumeyer, Chair, CMMB**

The survey findings for Central, South America & the Caribbean suggest a clear takeaway: companies should examine whether their assets, services, and workforce plans reflect current customer needs rather than an expectation that past conditions will return

THREE QUESTIONS FOR YOUR BUSINESS

Revenue: Are you handling the same number of moves but shipping less and earning less per move?

Offer: Does your service mix fit current allowances and the possessions customers choose to ship?

Buying Decision: What evidence helps customers and RMCs assess reliability beyond the quoted price?

Eastern & Southeastern Asia

CMMB Representatives:
Olivia Alarcon *(A1 Global Logistics Services Co.) &* ***Nirav Thakker*** *(21st Century Relocations)*

Business improves for some, while customers continue to seek lower costs

42%

Described their business as improving compared to the decline reported in the First Regional Pulse.

68%

Selected continued demand for lower-cost solutions among the customer changes expected to have the greatest impact over the next 12 to 24 months.

BEHIND THE NUMBERS

On **Olivia Alarcon's** side of the region, imports are slightly higher than last year, with more groupage bookings coming from the Middle East. In her experience, many Filipino overseas workers in the Middle East "panicked": some left, and others began sending their belongings home. Outbound improvement, she says, has been very minimal.

Understanding that change drove **Nirav Thakker** and **Olivia** to shape the second survey. The first Regional Pulse survey had identified declining volumes, smaller shipments, and price sensitivity. The representatives proposed looking ahead: *"What are you seeing now that you did not see in the first Pulse, and what changes do you expect next?"*

The responses reveal improvement, but not a clear return to previous trading conditions. **42%** described their business as improving. Looking ahead, **68%** expected continued demand for lower-cost solutions to be among the most consequential customer changes, and **53%** selected smaller household shipments or greater use of courier and alternative modes. Together, these results suggest companies may be gaining activity while preparing for a different mix of work.

The distinction is commercially important because fuel costs are rising while price competition persists. More bookings can keep a business busy without strengthening its margins. The key measure is what the changing shipment mix contributes after freight, handling and delivery costs.

Opportunity also varies by corridor. **58%** expected intra-Asia movements to grow in importance for their businesses; **37%** selected Middle East to Asia. The assessment that improvement differs by country and customer segment points to the value of local partner insight: understanding who is moving, what they are shipping, and whether that demand is likely to continue.

Technology investment adds a different dimension. **47%** selected AI-enabled tools among their most significant planned investments, while only **5%** placed AI and technology among the three factors expected to exert the greatest industry influence. These questions separate investment priorities

Eastern & Southeastern Asia

CMMB Representatives:
Olivia Alarcon *(A1 Global Logistics Services Co.) &* ***Nirav Thakker*** *(21st Century Relocations)*

from market expectations. Olivia sees practical potential in reducing repetitive work and operating costs, helping companies respond to conditions they cannot control.

Members' priorities for IAM complete the picture: **58%** selected regional and global market intelligence, and **47%** selected business development and networking. Together, these findings show IAM's practical role: connecting evidence of changing demand with the partner knowledge members need to assess and serve it.

THREE QUESTIONS FOR YOUR BUSINESS

Business performance: Which growing lanes are improving earnings after freight, fuel, and handling costs?

Service mix: Does your pricing and consolidation model remain profitable as consignment sizes change?

Investment: Which recurring costs can technology reduce, and would those savings still justify the investment if volumes remain uneven?

Europe

CMMB Representatives:
Christiaan van der Ent *(Van der Ent Group) &* ***Barbara Savelli*** *(Gosselin)*

Preparing for technological change while managing workforce and geopolitical uncertainty

8%

Were very confident about recruiting and retaining qualified operational staff over the next 12 months.

51%

Selected digitalization and automation among their greatest investment areas over the next 12 months.

36%

Selected AI solutions among their greatest investment areas over the next 12 months.

BEHIND THE NUMBERS

One survey respondent imagines humanoid robots carrying furniture upstairs within three years. Another sees recruiting and retaining qualified operational staff as the industry's most important challenge. These responses capture two different expectations of the future: technology changing who performs the work, and companies struggling to find people to perform it.

The robot timetable is one respondent's prediction, not an established industry forecast. Yet it raises a practical question already relevant to business planning: which tasks could technology change, and which still depend on experienced people?

The areas of reported impact are more familiar. **43%** selected marketing and communications among the areas where AI and automation have their greatest impact; **40%** selected quotations, compared with **15%** selecting operations planning. The results suggest that reported benefits are more widespread in commercial and administrative work than in operational planning.

Christiaan van der Ent believes effective use deserves more attention:

> *"I think people are underestimating AI, mainly because there is still insufficient knowledge about how to use it effectively."*
>
> **- Christiaan van der Ent, Van der Ent Group**

Europe

CMMB Representatives:
Christiaan van der Ent *(Van der Ent Group) &* ***Barbara Savelli*** *(Gosselin)*

Christiaan also points to population aging as context for workforce planning. Eurostat reports that **22% of EU residents were aged 65 or older in 2025;**[1] European Commission research projects nearly one-third by 2050.[2] These figures describe the wider population, rather than the moving workforce, but give companies reason to examine succession, recruitment and training over a longer horizon.

Barbara Savelli agrees with Christiaan's comments and considers the other survey findings consistent with the trends she is seeing.

Geopolitical uncertainty runs through the open responses too. Members raise concerns about conflict, international relations, protectionism, and their effects on costs and relocation activity. The survey does not quantify a shared geopolitical impact, but the comments show why staffing and technology decisions cannot be separated from expectations about future demand.

The planning challenge is to identify the capabilities a company needs as conditions change. Investment intentions alone cannot show whether a tool saves time, improves service, or reduces dependence on a hard-to-fill role. Members need to measure those outcomes inside the business.

THREE QUESTIONS FOR YOUR BUSINESS

AI: Which task could you improve now, and how will you measure the time saved or errors reduced?

Workforce: Which skills would be hardest to replace if experienced employees left?

Geopolitics: How would changes in relocation demand or trade routes affect your staffing and investment plans?

References

1. Eurostat, Demography of Europe: 2026 edition.

2. European Commission Joint Research Centre, Demographic transformation in the EU: challenges and opportunities, July 14, 2026.

Middle East & Near Asia

CMMB Representatives:
***Ankit Bhalla** (Leader Relocation LLC) & **Shankar Ram Ganapathy** (Delight International Movers)*

Disruption changes the cost and timing of a move

81%

Reported a significant or moderate negative business impact from ongoing wars, geopolitical tensions, or regional security concerns.

59%

Reported passing increased costs to customers fully or in most cases.

81%

Reported increased storage demand compared with the same period in 2025.

BEHIND THE NUMBERS

The European comments raise questions about how geopolitical uncertainty affects business planning. The Middle East and Near Asia survey examines its immediate operating consequences: the route a shipment takes, the time it spends in transit and the cost of completing the move.

Ankit Bhalla and **Shankar Ram Ganapathy** identify shipping-route disruption, increased freight rates and longer transit times as the principal operational challenges. **81%** selected increased freight and transportation costs among their greatest financial pressures. Yet **59%** reported passing increased costs to customers fully or in most cases. Higher costs do not necessarily translate into costs absorbed by the business, and recovering those costs does not, on its own, confirm that profit margins are protected.

Storage presents a related business question. **81%** reported rising demand, while **33%** were near or at full capacity. A fuller warehouse can generate more revenue, but goods remaining longer also occupy space needed for the next customer. The survey does not establish what is driving the increase. For operators, the question is whether additional demand produces adequate returns after handling costs and the time goods remain.

Europe was the strongest outbound lane for **56%** of respondents, connecting this regional experience to the partners receiving those shipments. When routes and delivery dates change, clear agreement on revised costs, storage arrangements, and customer updates becomes particularly important.

81% of respondents said they use IAM membership as a selling point regularly or occasionally, indicating that most respondents see commercial value in communicating their affiliation.

Middle East & Near Asia

CMMB Representatives:
Ankit Bhalla *(Leader Relocation LLC) &* ***Shankar Ram Ganapathy*** *(Delight International Movers)*

THREE QUESTIONS FOR YOUR BUSINESS

Cost recovery: Are you maintaining margins after passing on higher costs, or recovering only part of the increase?

Storage: With demand rising and capacity tightening, which storage commitments generate the best return on available space?

Partner coordination: Do agreements with origin and destination partners clearly allocate additional costs when routes or delivery dates change?

North America

CMMB Representatives:
***Leon Johnson** (Matco Moving Solutions), and **Tracie Cohee** (Von Paris International)*

Growing outbound activity does not remove margin pressure

56%

Selected rate undercutting by non-asset brokers among their top two margin pressures for international shipments.

53%

Reported increased outbound international shipment volume year over year.

BEHIND THE NUMBERS

North American respondents report different conditions in international moving. **53%** saw outbound international shipment volume increase year over year, while **56%** reported flat U.S.–Canada–Mexico cross-border volume.

Leon Johnson says that difference matches what he sees and hears from other agents. He describes multinational relocations, expatriate assignments, and global talent movement supporting outbound activity. In U.S.–Canada moves, he sees more cautious spending and economic friction slowing decisions.

Corporate demand is also shifting with purchasing arrangements. **54%** reported clients moving toward lump-sum stipends, reducing fully managed moves; **46%** reported requests for lower-cost or capped options. Continued relocation activity therefore does not necessarily preserve the service scope or spending associated with it.

Tariffs require similarly careful interpretation. **49%** selected minimal or no impact on core household goods moves, the most frequently selected answer. Yet **28%** selected customer confusion or booking delays over duty liability, and **28%** selected increased paperwork and customs inspection delays.

The most frequently selected margin pressure was rate undercutting by non-asset brokers (**56%**), followed by crew and driver compensation (**39%**) and freight-rate volatility and port surcharges (**35%**). For established providers, the challenge is demonstrating what their price includes while covering the costs of delivering that service.

Ocean schedules add another demand on the business. **44%** identified carrier schedule unreliability and blank sailings as their most significant source of supply-chain delays, compared with **24%** selecting port congestion. Customers still expect the mover to manage a disrupted shipment, even when the carrier controls the sailing.

North America

CMMB Representatives:
***Leon Johnson** (Matco Moving Solutions), and **Tracie Cohee** (Von Paris International)*

Taken together, the findings make a stronger case for examining the composition of growth than for relying on total shipment counts. Which customers are moving, how they purchase services, and how much coordination their shipments require all affect what each move earns.

THREE QUESTIONS FOR YOUR BUSINESS

Demand: How are lump-sum allowances and capped budgets changing the services customers purchase and your return per move?

Margins: Which lanes remain profitable after crew costs, freight changes, and time spent managing exceptions?

Reliability: Where do recurring carrier disruptions justify changes to routing, carrier selection or quotation terms?

Oceania

CMMB Representatives:
Michael Dunstan *(Palmers Relocation Group), and* ***Carlos Ferri*** *(Shipeezi Pty Ltd.)*

Cutting the cost of work and getting paid for it

84%

Expected business activity to remain about the same or decline moderately over the next 12 months.

68%

Expected technology and software investment to increase over the next 12 months.

BEHIND THE NUMBERS

Oceania's respondents are preparing to invest despite expecting little improvement in trading conditions. **84%** anticipated similar activity or a moderate decline over the next year, yet **68%** expected technology investment to increase. The central takeaway: firms are spending to strengthen resilience, not because conditions are improving.

Carlos Ferri sees margin protection as a central motivation. **53%** identified increased price focus as the most significant customer change, and **32%** selected shorter booking lead times. Faster surveying, quoting, and administration could help companies respond without increasing the resources required for each job.

No respondent selected greater demand for digital communication and visibility as the main customer change. While this does not establish what drives technology spending, it supports Carlos's interpretation that companies are looking inward for efficiencies.

Michael Dunstan adds that investment can mean replacing expensive legacy systems, adopting more capable tools, or strengthening cybersecurity. These are different uses of the same budget. Both representatives caution that the market was changing as respondents answered. Questions developed in late July were completed during the slowdown, and they believe conditions subsequently deteriorated. Their observations add context; the survey itself does not measure what happened after responses closed.

Michael also describes rising fuel costs and supplier surcharges alongside continued customer price pressure. **47%** of respondents named operating costs as the greatest challenge over the next year. Efficiency may help address that squeeze, but payment introduces a separate constraint.

Oceania

CMMB Representatives:
***Michael Dunstan** (Palmers Relocation Group), and **Carlos Ferri** (Shipeezi Pty Ltd.)*

A completed move can show a profit on paper while the payment remains outstanding. The mover has already committed resources to the work; those funds are unavailable for the next job until the invoice is settled. Written responses raised extended payment periods, payment security, and the need for members to honor agreed terms.

IAM's Oceania regional representatives warn that formal disputes could increase as companies become less able to carry overdue partner accounts for 90 or 120 days. The concern is that financial pressure can force escalation even where relationships remain valued.

Carlos supports measuring payment behavior and credit risk directly. He also highlights a longer-term burden: **47%** ranked regulatory and compliance changes first or second for impact over three years, although none selected them as the greatest 12-month challenge.

The implications for IAM are specific: practical evidence on technology use, useful regulatory guidance and better measurement of payment conditions. Members' experience points toward the next questions the research needs to answer.

THREE QUESTIONS FOR YOUR BUSINESS

Cash flow: How much overdue partner debt can your business carry without restricting current operations?

Technology: Which investments reduce the total cost of serving a move, and which address replacement or security needs?

Credit: Where does payment history warrant revised credit limits, deposits or earlier escalation?

What the Survey Results Reveal

A mover can be busier than last year and still earn less on each job. Its own books won't show why: the cause may be a rerouted sailing, a lump-sum stipend, or a partner who hasn't paid. Read side by side, seven regional surveys point to five patterns.

01 Volume alone no longer tells the full story

In North America, **53%** report higher outbound international volume, yet **54%** see clients shifting to lump-sum stipends and **46%** report requests for lower-cost or capped options. In Eastern and Southeastern Asia, **42%** describe their business as improving, while **68%** expect continued demand for lower-cost solutions and **53%** expect smaller household shipments or greater use of courier and alternative modes.

Question for IAM Members: Do you know what each move contributes after freight, handling and exception time, or only how many moves you handled?

02 Price pressure shows up in four regions

In Central, South America & the Caribbean, **87%** name price among the top influences on customer selection, but only **4%** compete on it. In Africa, **85%** rate price-based competition a very or extremely significant challenge to the industry's reputation. In North America, **56%** rank broker undercutting among their top two margin pressures; in Oceania, **53%** name increased price focus as the biggest customer change.

Question for IAM Members: What evidence of reliability can a buyer check before comparing your quote with a cheaper one?

03 The Middle East connects to Europe and Asia in the survey data

Middle East and Near Asia respondents feel the conflict directly: **81%** report a negative business impact, and **81%** cite freight and transport costs among their top financial pressures. The region also appears in Eastern and Southeastern Asia's results, where **37%** expect Middle East to Asia moves to grow in importance. In the Middle East and Near Asia, Europe is the strongest outbound lane for **56%** of respondents.

Question for IAM Members: What evidence of reliability can a buyer check before comparing your quote with a cheaper one?

04 Technology investment is rising while reported benefits stay narrow

In Europe, **51%** plan to invest in digitalization and **36%** in AI, yet reported impact is highest in marketing (**43%**) and quotations (**40%**) and lowest in operations planning (**15%**). In Eastern and Southeastern Asia, **47%** list AI tools as a major investment, while **5%** rank technology among the top three industry influences. In Oceania, **68%** expect to increase technology spending despite a flat outlook.

Question for IAM Members: Which technology investment can you show has reduced your cost per move?

05 Late payment is an old problem with less room to absorb it

In Oceania, **47%** name operating costs as the top challenge. Payment concerns also surfaced unprompted in **three of the twelve written responses** on IAM priorities, citing extended payment periods, payment security, and honoring agreed terms. In the Middle East and Near Asia, **59%** pass on increased costs, but cost recovery does not necessarily protect margins. IAM's Oceania regional representatives warn that fewer movers can carry partner accounts for 90 or 120 days. These payment concerns draw on written member feedback and representative observations rather than direct survey measurement, making them an important area to examine in the next round.

> **Question for IAM Members:** How much of your receivables sits with partners paying beyond agreed terms, and how concentrated is that exposure?

What comes next

The CMMB and IAM staff will use these findings to determine the regional priorities for 2027 and the next round of surveys. The opportunity is to turn member input into practical support: helping companies adopt technology, navigate country-specific requirements, strengthen trusted partnerships, and respond to changing customer needs and relocation demand. Regional representatives will help identify where IAM can make the greatest difference, with clear actions and measures of value for members.

This report began with members willing to share what they were seeing, and CMMB representatives who helped make sense of it. Thank you for giving us a clearer picture of the pulse of the industry.

Questions or intelligence for the next cycle? Contact your regional representative or IAM staff liaisons to the CMMB: Julia O'Connor (**juliao@iamovers.org**) or Matthieu Odijk (**matthieu.odijk@iamovers.org**).