



## WA State Board of Pilotage Commissioners Industry Update March 21, 2024 Meeting

### Arrivals Up by 43 YTD

*Recall February 2023 Was Very Low Arrival Month*

✚ Containers up 16	✚ Car Carriers down 1
✚ Bulkers up 14	✚ Tankers up 5
✚ General up 4	✚ ATB's up 2
✚ Other down 2	✚ RoRo up 5

### February 2024 Arrival Total More Normal Compared to February 2023

Recall that last year that February was a very low arrival month – lowest on record for container vessels. The extra day of this leap year helped when compared to 20203. With an average of 6.2 arrivals/day, the February 2024 daily average was less than January.

### The Rest of 2024? Gateway Efficiency/Productivity Needs to Improve

As we proceed further into the year into March and April we will have a better idea of what 2024 is shaping up to be. There are some expected changes in certain services including a reduction of a weekly service calling via the Blair Waterway (**potential loss of 208 assignments if annualized**). Given the low container volume numbers here, this is not good news, however the west coast container volumes have been ticking up (see article below). We will also assess whether the ratio of pilot assignments to arrivals remains at traditional levels or not. The speaker at the Transportation Club of Seattle highlighted that more efficiency and productivity is needed in the gateway in order to win cargo levels back. Currently, terminals are not able to financial sustain 5 day/week operations.

### PMSA Leadership Change, Issue Updates

PMSA held a member meeting with updates on a number of issues in California and here in Washington State. In addition, PMSA President John McLaurin provided outgoing comments including the continuing need of members to fully participate in advocacy and messaging efforts to better position the gateway in this competitive environment where the west coast has been losing market share – see graph provided last month. Pilot service, slowdowns, potential new regulations and other factors were discussed. Incoming President Mike Jacob emphasized the need for continued communication between PMSA and members as we navigate through the challenges discussed at the meeting. Updates were provided by the PMSA Lobbyist, Washington Maritime Federation, NWSA, Coast Guard Captain of the Port, Marine Exchange, HSC and PMSA Staff.

## **TPM24: Spot Rate Spike Hits Transpacific Contract Negotiations**

The Loadstar Total Views: 996 March 11, 2024

By Mike Wackett (The Loadstar)

<https://gcaptain.com/tpm24-spot-rate-spike-hits-transpacific-contract-negotiations/>

Based upon initial feedback to The Loadstar, there appears to have been only a handful of shippers, forwarders and NVOCCs that came away from the S&P Global TPM24 conference in Long Beach, California, last week with new transpacific contracts. Some had decided to wait for the Red Sea crisis to abate and spot rates to fall, while others simply received what one forwarder told The Loadstar was a “ridiculous response from a carrier to his company’s RfQ” (quotation request). “We came here with the objective of trying to get the basis for a new annual contract, but it seems that the spike in spot rates connected to the Red Sea disruption has given the lines a new baseline for tenders,” one California-based customs broker told The Loadstar on the sidelines of TPM24. Another contact e-mailed The Loadstar after the event to report that, “despite our best efforts we were unable to come to terms at TPM”. The spot indices had remained elevated going into TPM with, for instance, the Freightos Baltic Global index in February 2.5 times higher than at the end of December, when carriers began diverting ships around the southern tip of Africa. More specifically, the FBX Asia-to-US west coast component recorded an average of \$4,754 per 40ft last week, which is some 120% higher than the ‘market’ at the time of last year’s TPM conference. Unlike in 2023, transpacific carrier account managers did not appear to be going all-out to sign new contracts at TPM – rather, they were content to lay the foundations for future negotiations as, and when, the market normalised.

## **East Coast, Gulf Coast Dockworker Talks Are Starting Under Threat of a Strike**

<https://www.wsj.com/articles/east-coast-gulf-coast-dockworker-talks-are-starting-under-threat-of-a-strike-9787ef96>

Union that represents 45,000 workers at ports from Maine to Texas says it will walk out if contract isn’t reached by October

By Paul Berger

March 11, 2024 2:13 pm ET

The International Longshoremen’s Association is seeking to build on strong wage gains other transportation unions have won. Contract talks at East Coast and Gulf Coast ports are starting this year under very different circumstances than the West Coast negotiations that rattled supply chains over the past two years. Cargo bottlenecks that left imports tied up at sea and at ports have largely cleared while record earnings for ocean carriers, a source of rancor during the West Coast talks, are dissipating in a vastly changed freight market.

## **West Coast leads latest surge in US container imports Top US ports have now seen 4 straight months of y/y volume growth**

<https://www.freightwaves.com/news/west-coast-ports-leads-latest-surge-in-us-container-imports#:~:text=January%20witnessed%20a%209.2%25%20year,by%20the%20post%2Dpandemic%20downturn.>

Joe Antoshak · Thursday, February 22, 2024

For 15 tumultuous months, the top U.S. ports grappled often with double-digit aggregate declines in y/y volume. Now, they’ve strung together four months of increases. The start of 2024 is bringing with it significant growth in volumes at top U.S. ports. January witnessed a 9.2% year-over-year increase in inbound containers. This rise represents the latest reading in four consecutive months of growth, a beacon of positive momentum after a challenging period dominated by the post-pandemic downturn. As trade volumes continue to recover and adapt to these new realities, the focus will increasingly shift toward enhancing port efficiency, diversifying trade routes and investing in sustainable logistics solutions.



## JANUARY 2024

# Partial Tallies

While we await the TEU tallies to trickle out from the major U.S. East Coast ports we follow, we take note of a February 8 forecast from the National Retail Federation's Global Port Tracker (NRF/GPT) that predicted January would see the arrival of 1.81 million import loads at the thirteen U.S. port they survey. That, as the NRF/GPT further stated, would represent a meager 0.3% year-over-year increase.

At the moment, we are not sure that that forecast will hold up. The seven U.S. West Coast ports we monitor report they collectively handled 937,829 inbound loads in January, a 17.3% jump over the 799,563 inbound loads those same ports handled a year earlier.

The **Port of Long Beach** was the first major port to post its January container trade figures. The 325,339 inbound loads discharged at the San Pedro Bay port in the year's first

month represented a 23.5% jump over the same month in 2023 but a much more slender 0.5% gain over pre-pandemic January 2019. Outbound loads (86,525), however were down by 18.1% year-over-year and by 26.2% from January 2019. Counting both loads and empties, total container traffic (674,015) in January was up 17.5% from a year earlier and 2.5% higher than in January 2019.

Across the way at the neighboring **Port of Los Angeles**, the year-over-year gains in import traffic were likewise robust. Inbound loads in January (441,763) were up 18.7% from the same month in 2023 but just 2.8% ahead of January 2019. Outbound loads (126,554) surged by 23.2% but were nonetheless down 12.7% from January 2019. Total container traffic (855,652) this January was up 17.9% y/y and 2.5% over the five years since January 2019.

Taken together, the two San Pedro

Bay ports posted a 20.7% year-over-year gain in inbound loads that brought them nearer to the volumes they had handled in the pre-pandemic January of 2019. Collectively, January's inbound loads were up by only 1.8% over the same month five years earlier, while outbound loads were 18.8% lower. Total container traffic through North America's principal maritime gateway grew by only 1.3% over the last five years.

Northern California's chief maritime gateway, the **Port of Oakland** reported 72,081 inbound loads in January. While that represented an 8.2% rise from a year earlier, it was down 12.0% from January 2019. Similarly, outbound loads (62,596) were up 9.3% y/y but down 16.9% from January 2019. Total container traffic (180,487) edged up 0.7% from a year earlier but remained down 15.1% from five years ago.

Up in Washington State, the

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## Partial Tallies

Continued

**Northwest Seaport Alliance Ports of Tacoma and Seattle** recorded 80,410 import loads in the year's first month. While that was up 1.7% from the previous January, it was down 35.5% from the 128,615 import loads the ports handled in January 2019. Export loads (46,215) in January jumped 19.6% y/y but remained 36.6% below January 2019. Total container traffic through the ports amounted to 211,283 in January, down 35.2% from five years earlier.

Across the border in British Columbia, the **Port of Vancouver** handled 147,768 inbound loads in January, a 22.0% bump over a year earlier but still down 13.3% from January 2019. Outbound loads (54,157) were down 9.7% y/y and 40.7% below January 2019. Total container traffic (262,880) through Canada's busiest container port was up 6.2% from a year earlier but down 16.2% from January 2019.

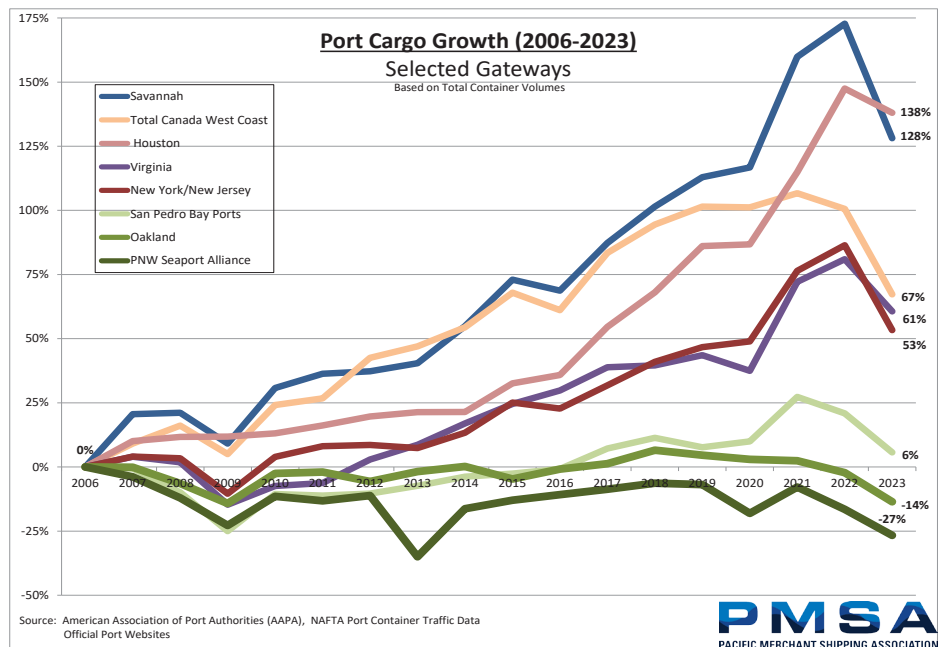
January saw little respite from falling TEU counts at the **Port of Prince Rupert**. Inbound loads (35,804) were down by 8.2% from a year earlier and 34.3% below the volume the port handled in January 2019. Outbound loads (11,443), while up 2.0% y/y, were down by 33.3% from January 2019. Total container traffic (62,567) was

down 18.3% from a year earlier and down 38.0% from January 2019.

The **Port of Charleston**, the only major U.S. East Coast port for which January container statistics were available by our press time, handled 99,765 inbound loads in the year's first month, down 8.3% from a year earlier but up 13.2% from January 2019. Outbound loads through the South Carolina port (60,962) were up 1.7% y/y but down 4.4% from January 2019. Total container trade in January (208,538) was up 1.4% from the same

month five years earlier.

Along the Gulf Coast, **Port Houston** reported all-around gains despite restrictions on cargo traffic through the Panama Canal. The Texas port handled 154,493 inbound loads in the first month of the year, up 3.4% year-over-year but also up 62.1% over January 2019. Outbound loads (124,137) were up 9.0% y/y and up 41.1% from January 2019. Total container traffic in January (332,961) was up 4.1% from a year earlier and up 53.9% from January 2019.



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FOR THE RECORD

# December 2023 and Total 2023 TEU Tallies

We note that the National Retail Federation’s collaboration with Global Port Tracker (NRF/GPT) reported on February 9 that the thirteen major U.S. ports it monitors had processed 1.87 million inbound loads in December, up 8.3% from a year earlier. That brought the total of inbound loads for CY2023 to 22.3 million. Although that represented a 12.8% fall-off from the year before, it did constitute a 3.2% increase over the 21.6 million inbound loads those same ports handled in CY2019.

As usual, we start our port-by-port accounting in Southern California, where the nation’s two busiest container ports announced huge year-over-year increases in December, albeit over a relatively slow month for inbound loads last year.

The **Port of Los Angeles** posted a 3.6% year-over-year gain in inbound loads to 364,661 in December. Still, that was down 2.4% from December 2019. For the year as a whole, inbound loads totaled 4,441,330, down 10.7% from the preceding year and 5.8% below the 4,714,266 inbound loads the port handled in 2019. Outbound loads in December (121,575) jumped by 26.0% from a year earlier but were nonetheless 6.6% below the mark set in December 2019. For the year, outbound loads (1,291,997) were down 26.4% from 2019. Total container traffic through the port in 2023 (8,629,681) was down by 7.6% from 2019.

Exhibit 1	December 2023 Inbound Loaded TEUs at Selected Ports				
	Dec 2023	Dec 2022	Dec 2019	Change from 2022	Change from 2019
Los Angeles	364,661	352,046	373,511	3.6%	-2.4%
Long Beach	333,329	241,643	323,231	37.9%	3.1%
<b>San Pedro Bay Total</b>	<b>697,990</b>	<b>593,689</b>	<b>696,742</b>	<b>17.6%</b>	<b>0.2%</b>
Oakland	76,347	65,566	81,281	16.4%	-6.1%
NWSA	88,101	85,183	105,823	3.4%	-16.7%
Hueneme	9,908	11,310	5,141	-12.4%	92.7%
San Diego	5,788	5,406	6,988	7.1%	-17.2%
<b>USWC Total</b>	<b>878,134</b>	<b>761,154</b>	<b>895,975</b>	<b>15.4%</b>	<b>-2.0%</b>
Boston	10,383	8,669	11,409	19.8%	-9.0%
NYNJ	326,412	303,596	288,964	7.5%	13.0%
Baltimore	47,649	49,665	43,869	-4.1%	8.6%
Philadelphia	30,655	26,827	27,171	14.3%	12.8%
Virginia	121,630	125,725	103,711	-3.3%	17.3%
S. Carolina	103,556	104,336	81,779	-0.7%	26.6%
Georgia	208,382	217,628	172,124	-4.2%	21.1%
Jaxport	30,184	26,776	24,513	12.7%	23.1%
Port Everglades	27,715	30,316	27,133	-8.6%	2.1%
Miami	43,691	42,075	39,238	3.8%	1.3%
<b>USEC Total</b>	<b>950,257</b>	<b>935,613</b>	<b>819,911</b>	<b>1.6%</b>	<b>15.9%</b>
New Orleans	9,459	8,356	11,916	13.2%	-20.6%
Houston	150,648	136,301	100,274	10.5%	50.2%
<b>USGC</b>	<b>160,107</b>	<b>144,657</b>	<b>112,190</b>	<b>10.7%</b>	<b>42.7%</b>
Vancouver	144,504	98,438	140,560	46.8%	2.8%
Prince Rupert	32,217	43,045	61,796	-25.2%	-47.9%
<b>British Columbia Total</b>	<b>176,721</b>	<b>141,483</b>	<b>202,356</b>	<b>24.9%</b>	<b>-12.7%</b>
<b>U.S. Totals</b>	<b>1,988,498</b>	<b>1,841,424</b>	<b>1,828,076</b>	<b>8.0%</b>	<b>8.8%</b>

Source Individual Ports



## December 2023 TEU Numbers

Continued

Next door at the **Port of Long Beach**, inbound loads in December (333,329) surged by 37.9% over the previous December and exceeded December 2019's volume by 3.1%. Total inbound loads in 2023 (3,804,356) topped the number of inbound loads in 2019 by 1.2%. Outbound loads in December (103,688) were down 10.4% from a year earlier and off by 17.3% from December 2019. Outbound loads in 2023 (1,282,437) were down 12.9% from 2019. Total container traffic through the port in 2023 (8,018,668) was up by 5.1% from 2019.

Together, the two San Pedro Bay ports handled 16,648,349 loads and empties in 2023, 1.9% below the total volume the ports handled in 2019. Inbound loads (8,245,686) in 2023 were down 2.7% from 2019, while outbound loads (2,574,434) were off by 20.3% from 2019.

At the **Port of Oakland**, inbound loads (76,347) in December were up 16.4% y/y but still 6.1% below December 2019. For the entire year, inbound loads (838,231) were down 14.0% from 2019. Meanwhile, outbound loads in December (65,801) rose 12.9% y/y but were down 11.8% from the last month of 2019. For all of 2023, outbound loads (736,213) were down 20.9% from 2019. Total container traffic through the Northern California port in 2023 (2,065,709) was not merely down 17.4% from 2019, it was the smallest number of containers handled by the Northern California port since the depth of the Great Recession in 2009.

Up in Washington State, the **Northwest Seaport Alliance Ports of Tacoma and Seattle** saw

### Exhibit 1A

### 2023 Inbound Loaded TEUs at Selected Ports

	2023	2022	2019	Change from 2022	Change from 2019
Los Angeles	4,441,330	4,975,735	4,714,266	-10.7%	-5.8%
Long Beach	3,804,356	4,358,789	3,758,438	-12.7%	1.2%
<b>San Pedro Bay Total</b>	<b>8,245,686</b>	<b>9,334,524</b>	<b>8,472,704</b>	<b>-11.7%</b>	<b>-2.7%</b>
Oakland	838,231	991,229	975,210	-15.4%	-14.0%
NWSA	1,078,005	1,249,746	1,369,251	-13.7%	-21.3%
Hueneme	118,084	136,920	59,848	-13.8%	97.3%
San Diego	74,984	77,802	71,723	-3.6%	4.5%
<b>USWC Total</b>	<b>10,354,990</b>	<b>11,790,221</b>	<b>10,948,736</b>	<b>-12.2%</b>	<b>-5.4%</b>
Boston	121,912	88,214	145,605	38.2%	-16.3%
NYNJ	3,990,316	4,804,436	3,770,971	-16.9%	5.8%
Baltimore	558,652	535,899	524,225	4.2%	6.6%
Philadelphia	366,710	373,075	291,492	-1.7%	25.8%
Virginia	1,525,900	1,728,911	1,366,381	-11.7%	11.7%
S. Carolina	1,220,384	1,383,491	1,066,314	-11.8%	14.4%
Georgia	2,402,328	2,873,100	2,218,655	-16.4%	8.3%
Jaxport	326,518	321,511	349,896	1.6%	-6.7%
Port Everglades	327,575	385,989	317,187	-15.1%	3.3%
Miami	509,707	527,510	445,238	-3.4%	14.5%
<b>USEC Total</b>	<b>11,350,002</b>	<b>13,022,136</b>	<b>10,495,964</b>	<b>12.8%</b>	<b>8.1%</b>
New Orleans	117,958	116,458	135,456	1.3%	-12.9%
Houston	1,787,539	1,916,832	1,244,790	-6.7%	43.6%
<b>USGC</b>	<b>1,905,497</b>	<b>2,033,290</b>	<b>1,380,246</b>	<b>-6.3%</b>	<b>38.1%</b>
Vancouver	1,601,949	1,835,407	1,709,398	-12.7%	-6.3%
Prince Rupert	369,464	535,970	678,699	-31.1%	-45.6%
<b>British Columbia Total</b>	<b>1,971,413</b>	<b>2,371,377</b>	<b>2,388,097</b>	<b>-16.9%</b>	<b>-17.4%</b>
<b>U.S. Totals</b>	<b>23,610,489</b>	<b>26,845,647</b>	<b>22,824,946</b>	<b>12.1%</b>	<b>3.4%</b>

Source Individual Ports



## December 2023 TEU Numbers

Continued

year-over-year increases in their December container volumes. Inbound loads (88,101) edged up 3.4% from the same month a year earlier, while outbound loads soared by 44.6% to 67,622. Even so, the ports finished the year well shy of their 2019 numbers. Last year, 1,078,005 inbound loads came through the two ports, down by 21.3% from 2019's volume. Similarly, outbound loads in 2023 (588,744) were off by 35.5% from 2019.

Collectively, the seven USWC ports we monitor handled 10,354,990 inbound loads during 2023, down 12.2% y/y and off by 5.4% from 2019. Outbound loads meanwhile totaled 3,931,983 last year, 22.8% below the volume in 2019.

Across the border in British Columbia, the **Port of Vancouver** inbound loads in December (144,504) jumped by 46.8% from an especially sluggish last month of 2022. Still, this December was up 2.8% over December 2019. For the whole year, inbound loads totaled 1,601,949, off by 6.3% from 2019. However, outbound loads in 2023 (588,744) were down 35.5% from 2019. For the entire year, total container traffic (3,125,559) at Canada's largest container port was 8.0% below the volume the port handled in 2019.

The **Port of Prince Rupert** continued to see declining container volumes in December. Inbound loads (32,217) were down y/y by 25.2% and by 47.9% from December 2019. For the year, inbound loads (369,464) were 45.6% below the 678,699 recorded in 2019. The port's traffic in outbound loads in 2023 (125,254) trailed 2019 by

### Exhibit 2 December 2023 Outbound Loaded TEUs at Selected Ports

	Dec 2023	Dec 2022	Dec 2021	Change from 2022	Change from 2019
Los Angeles	121,575	96,518	130,229	26.0%	-6.6%
Long Beach	103,688	115,782	125,395	-10.4%	-17.3%
<b>San Pedro Bay Totals</b>	<b>225,263</b>	<b>212,300</b>	<b>255,624</b>	<b>6.1%</b>	<b>-11.9%</b>
Oakland	65,801	58,302	74,643	12.9%	-11.8%
NWSA	67,622	46,781	75,868	44.6%	-10.9%
Hueneme	1,412	3,638	1,285	-61.2%	9.9%
San Diego	478	738	308	-35.2%	55.2%
<b>USWC Totals</b>	<b>360,576</b>	<b>321,759</b>	<b>407,728</b>	<b>12.1%</b>	<b>-11.6%</b>
Boston	6,313	4,564	5,664	38.3%	11.5%
NYNJ	104,278	102,866	110,768	1.4%	-5.9%
Baltimore	20,006	20,549	17,857	-2.6%	12.0%
Philadelphia	5,921	6,803	5,710	-13.0%	3.7%
Virginia	91,758	90,838	78,285	1.0%	17.2%
S. Carolina	58,544	63,320	61,903	-7.5%	-5.4%
Georgia	113,197	107,724	111,373	5.1%	1.6%
Jaxport	40,703	43,785	38,013	-7.0%	7.1%
Port Everglades	33,273	33,831	31,995	-1.6%	4.0%
Miami	21,397	22,812	35,034	-6.2%	-38.9%
<b>USEC Totals</b>	<b>495,390</b>	<b>497,092</b>	<b>496,602</b>	<b>-0.3%</b>	<b>-0.2%</b>
New Orleans	20,687	14,973	24,304	38.2%	-14.9%
Houston	119,970	108,510	109,721	10.6%	9.3%
<b>USGC Totals</b>	<b>140,657</b>	<b>123,483</b>	<b>134,025</b>	<b>13.9%</b>	<b>4.9%</b>
Vancouver	70,649	53,397	86,892	32.3%	-18.7%
Prince Rupert	12,123	12,274	17,344	-1.2%	-30.1%
<b>British Columbia Totals</b>	<b>82,772</b>	<b>65,671</b>	<b>104,236</b>	<b>26.0%</b>	<b>-20.6%</b>
<b>U.S. Totals</b>	<b>996,623</b>	<b>942,334</b>	<b>1,038,355</b>	<b>5.8%</b>	<b>-4.0%</b>

Source Individual Ports



## December 2023 TEU Numbers

Continued

34.8%. Total container trade in 2023 (704,248) was down 41.8% from 2019.

Back East, the nation's third busiest container port, the **Port of New York/New Jersey**, recorded 326,412 inbound loads in December, up 7.5% year-over-year as well as 13.0% higher than December 2019. For the year, 3,990,270 inbound loads were discharged at the top Atlantic Coast maritime gateway, 5.8% more than in 2019. Outbound loads last year (1,284,976) were down by 12.0% from 2019. Total container traffic in 2023 (7,810,005) was 4.5% ahead of 2019.

The **Port of Virginia** reported 121,630 inbound loads in December, a 3.3% fall-off from a year earlier but a 17.3% gain over December 2019. For the year, inbound loads (1,525,900) were up 11.7% from 2019. Outbound loads in 2023 were up 14.0% over 2019. Total container traffic through the port this year (3,287,546) represented an increase of 11.9% over 2019.

Further south, the **Port of Charleston** saw a flattening of its overall container traffic. To be sure, December brought 103,556 inbound loads, a 26.6% bump over December 2019. That also gave the South Carolina maritime gateway a full-year total of 1,220,384 inbound loads, 14.4% more than the annual volume of inbound loads it had handled in 2019. But outbound traffic in 2023 was off by 9.1% from 2019. So, despite the hubbub about rising container volumes through ports in the Southeastern quadrant of the nation, total traffic of loads and empties (2,482,080) in 2023 was just 1.9% higher than the volume the port handled in 2019.

### Exhibit 2A

### 2023 Outbound Loaded TEUs at Selected Ports

	2023	2022	2019	Change from 2022	Change from 2019
Los Angeles	1,291,997	1,187,085	1,756,177	8.8%	-26.4%
Long Beach	1,282,437	1,414,882	1,472,802	-9.4%	-12.9%
<b>San Pedro Bay Total</b>	<b>2,574,434</b>	<b>2,601,967</b>	<b>3,228,979</b>	<b>-1.1%</b>	<b>-20.3%</b>
Oakland	736,213	760,940	931,019	-3.2%	-20.9%
NWSA	588,744	561,244	913,332	4.9%	-35.5%
Hueneme	23,069	40,886	14,956	-43.6%	54.2%
San Diego	9,523	11,168	3,725	-14.7%	155.7%
<b>USWC Total</b>	<b>3,931,983</b>	<b>3,976,205</b>	<b>5,092,011</b>	<b>-1.1%</b>	<b>-22.8%</b>
Boston	64,184	37,920	81,520	69.3%	-21.3%
NYNJ	1,284,976	1,299,070	1,460,447	-1.1%	-12.0%
Baltimore	234,408	243,209	232,957	-3.6%	0.6%
Philadelphia	82,036	101,310	76,621	-19.0%	7.1%
Virginia	1,101,620	1,076,146	966,102	2.4%	14.0%
S. Carolina	702,973	665,458	816,962	5.6%	-14.0%
Georgia	1,336,121	1,348,850	1,470,373	-0.9%	-9.1%
Jaxport	520,652	545,300	497,149	-4.5%	4.7%
Port Everglades	391,774	409,641	427,422	-4.4%	-8.3%
Miami	277,576	303,575	416,466	-8.6%	-33.3%
<b>USEC Total</b>	<b>5,996,320</b>	<b>6,030,479</b>	<b>6,446,019</b>	<b>-0.6%</b>	<b>-7.0%</b>
New Orleans	230,906	224,886	299,511	2.7%	-22.9%
Houston	1,388,004	1,269,374	1,265,669	9.3%	9.7%
<b>USGC</b>	<b>1,618,910</b>	<b>1,494,260</b>	<b>1,565,180</b>	<b>8.3%</b>	<b>3.4%</b>
Vancouver	757,747	703,005	1,121,973	7.8%	-32.5%
Prince Rupert	125,254	136,531	192,068	-8.3%	-34.8%
<b>British Columbia Total</b>	<b>883,001</b>	<b>839,536</b>	<b>1,314,041</b>	<b>5.2%</b>	<b>-32.8%</b>
<b>U.S. Totals</b>	<b>11,547,213</b>	<b>11,500,944</b>	<b>13,103,210</b>	<b>0.4%</b>	<b>-11.9%</b>

Source Individual Ports





## Exhibit 3 December 2023 YTD Total TEUs

	Dec 2023	Dec 2022	Dec 2021	Change from 2022	Change from 2019
Los Angeles	8,629,681	9,911,159	9,337,632	-12.9%	-7.6%
Long Beach	8,018,668	9,133,657	7,632,032	-12.2%	5.1%
NYNJ	7,810,051	9,493,664	7,471,131	-17.7%	4.5%
Georgia	4,927,654	5,892,131	4,599,172	-16.4%	7.1%
Houston	3,824,600	3,976,718	2,990,175	-3.8%	27.9%
Virginia	3,287,546	3,703,230	2,937,962	-11.2%	11.9%
Vancouver	3,126,559	3,557,294	3,398,860	-12.1%	-8.0%
NWSA	2,974,416	3,384,018	3,775,303	-12.1%	-21.2%
S. Carolina	2,482,080	2,792,313	2,436,185	-11.1%	1.9%
Oakland	2,065,709	2,337,607	2,500,461	-11.6%	-17.4%
Montreal	1,538,464	1,722,704	1,745,245	-10.7%	-11.8%
JaxPort	1,298,010	1,323,805	1,336,263	-1.9%	-2.9%
Baltimore	1,126,511	1,069,421	1,073,688	5.3%	4.9%
Miami	1,088,538	1,184,776	1,148,935	-8.1%	-5.3%
Port Everglades	1,006,980	1,091,288	1,033,460	-7.7%	-2.6%
Prince Rupert	704,248	1,035,642	1,210,776	-32.0%	-41.8%
Phila.	743,899	755,980	593,241	-1.6%	25.4%
New Orleans	481,590	430,215	646,608	11.9%	-25.5%
Hueneme	240,555	266,958	122,594	-9.9%	96.2%
Boston	236,975	173,926	300,762	36.3%	-21.2%
San Diego	150,646	160,513	143,472	-6.1%	5.0%
Portland, Oregon	116,063	171,481	26	-32.3%	∞
<b>U.S. Ports Total</b>	<b>50,510,172</b>	<b>57,252,860</b>	<b>50,079,102</b>	<b>-11.8%</b>	<b>0.9%</b>

Source Individual Ports

## Exhibit 4 Major USWC Ports Shares of U.S. Mainland Ports Worldwide Container Trade, December 2023

		Dec 2023	Dec 2022	Dec 2019	Dec 2013
<b>Import Tonnage</b>	<b>USWC</b>	<b>35.0%</b>	<b>32.8%</b>	<b>37.4%</b>	<b>43.7%</b>
	LA/LB	26.0%	23.5%	26.9%	32.5%
	Oak.	3.4%	3.8%	4.3%	4.1%
	NWSA	3.7%	3.5%	4.9%	5.1%
<b>Import Value</b>	<b>USWC</b>	<b>40.0%</b>	<b>37.6%</b>	<b>44.8%</b>	<b>52.2%</b>
	LA/LB	31.0%	29.2%	33.7%	41.0%
	Oak.	3.2%	2.8%	3.8%	3.7%
	NWSA	4.5%	4.5%	6.5%	6.6%
<b>Export Tonnage</b>	<b>USWC</b>	<b>33.5%</b>	<b>31.9%</b>	<b>35.3%</b>	<b>44.0%</b>
	LA/LB	20.4%	19.6%	20.6%	27.7%
	Oak.	5.8%	5.5%	6.2%	6.1%
	NWSA	6.6%	5.7%	7.7%	8.6%
<b>Export Value</b>	<b>USWC</b>	<b>33.5%</b>	<b>31.9%</b>	<b>35.3%</b>	<b>44.0%</b>
	LA/LB	20.4%	19.6%	20.6%	27.7%
	Oak.	5.8%	5.5%	6.2%	6.1%
	NWSA	6.6%	5.7%	7.7%	8.6%

Source: U.S. Commerce Department

## Exhibit 5 Major USWC Ports Shares of U.S. Mainland Ports Containerized Trade with East Asia, December 2023

		Dec 2023	Dec 2022	Dec 2019	Dec 2013
<b>Import Tonnage</b>	<b>USWC</b>	<b>51.7%</b>	<b>51.1%</b>	<b>55.3%</b>	<b>64.7%</b>
	LA/LB	41.2%	39.8%	43.0%	50.2%
	Oak.	4.1%	4.2%	4.8%	4.4%
	NWSA	5.5%	5.8%	7.2%	8.4%
<b>Import Value</b>	<b>USWC</b>	<b>59.6%</b>	<b>57.2%</b>	<b>64.4%</b>	<b>73.7%</b>
	LA/LB	47.5%	45.7%	49.7%	59.1%
	Oak.	4.1%	3.3%	4.6%	4.2%
	NWSA	6.7%	6.9%	9.5%	9.5%
<b>Export Tonnage</b>	<b>USWC</b>	<b>53.2%</b>	<b>52.2%</b>	<b>59.9%</b>	<b>67.7%</b>
	LA/LB	33.6%	33.1%	36.6%	45.8%
	Oak.	7.7%	7.9%	9.1%	8.0%
	NWSA	11.0%	9.8%	13.4%	13.1%
<b>Export Value</b>	<b>USWC</b>	<b>54.6%</b>	<b>52.9%</b>	<b>62.1%</b>	<b>68.7%</b>
	LA/LB	36.7%	34.8%	41.3%	51.1%
	Oak.	10.3%	9.5%	11.1%	8.4%
	NWSA	6.9%	7.4%	8.7%	8.6%

Source: U.S. Commerce Department



## December 2023 TEU Numbers

Continued

At the **Port of Savannah**, the 208,382 inbound loads discharged in December represented a 26.6% bump from December 2019, while total inbound loads for all of 2023 (2,402,328) were up 8.3% over 2019. Outbound loads from the Georgia gateway amounted to 1,336,121 in 2023. But that was down 9.1% from 2019.

Along the Gulf of Mexico, **Port Houston** handled 150,648 inbound loads in December and 1,787,539 inbound loads for the year, a gain of 46.3% over 2019. The Texas port handled 1,388,044 outbound loads in 2023, an increase of 9.7% over 2019.

Looking at shifts in coastal shares of the nation's container trade, December saw USWC ports handle 44.2% of all inbound loads in December but a more modest 43.9% for the year. Both represented gains from the preceding year, but both were significantly below the shares USWC ports enjoyed in 2019 when 48.0% of all inbound loads passed through America's Pacific Coast ports.

The USWC share of America's containerized export trade actually

contracted in 2023 to 34.1% from 34.6% in 2022 and from 38.9% in 2019. December, though, did see an uptick in the USWC export share from a year earlier.

### Container Contents' Weights and Values

We acknowledge that the maritime industry prefers to count containers. Some in the industry may even regard our routine reporting of the declared weights and values of containerized shipments as just so much pandering to economists. Still, as we shall see, there's a good reason for publishing the numbers in **Exhibits 4 and 5**.

We remind readers that both exhibits display the USWC shares of the nation's containerized trade through all mainland U.S. ports. The underlying data are derived from import/export documents shippers file with Customs and Border Protection. For a broader perspective, we compare the most recent month for which data are available with the same month in the preceding year, in pre-pandemic 2019, and a decade earlier.

**Exhibit 4** shows a significant uptick in the USWC share of all containerized

import tonnage flowing into the mainland U.S. ports with which USWC directly compete. Nearly all of the net gain can be attributed to increased volumes of imports through the Ports of Los Angeles and Long Beach. Still, the latest USWC shares remain well below the historical benchmarks.

**Exhibit 5** focuses on the USWC shares of U.S. containerized trade involving trading partners in East Asia. Again, the numbers indicate that the Ports of Los Angeles and Long Beach are capturing a significantly larger share of the containerized import trade as well as an appreciably bigger share of containerized exports to East Asia. The latest shares, however, remain sharply down from the historic benchmarks.

So why do we fuss about measuring the weight and dollar value of the nation's containerized trade? Here's one reason.

Earlier this month, we saw a report from a normally reputable source in the logistics industry claiming, contrary to all the bad economic news coming out of China lately, that "China is currently sending the highest volume of ocean container freight

*We Make Cargo Move*



**The Port  
OF HUENEME**



## December 2023 TEU Numbers

Continued

to the United States since May 2022”.

Regrettably, the only statistical evidence the author presented to support that statement was a graph showing container volumes leaving China for U.S. ports in January, a month in which such shipments normally surge in the run-up to the Lunar New Year.

But that’s not the whole story. For, even if TEU numbers are rising, data on the weight and actual value of the merchandise in those TEUs paint a much different picture of America’s recent imports from China. Viewing the data presented in **Exhibits 6 and 7**, we’re hard-pressed to identify much of a surge.

### Handwriting on the Wall

We came across a report from the U.S. Bureau of Transportation Statistics that could have been written yesterday. Except the date on its cover is December 2011. Here’s the key takeaway: “The U.S. population movement to the west and south has changed the ultimate destination for many imported consumer goods. Shippers are routing more cargo through U.S. South Atlantic and Gulf Coasts, placing inland points and nearby consumers in easy reach.” (U.S. Bureau of Transportation Statistics, “The Changing Tide of U.S.-International Container Trade: Differences Among the U.S. Atlantic, Gulf, and Pacific Coasts” December 2011.)

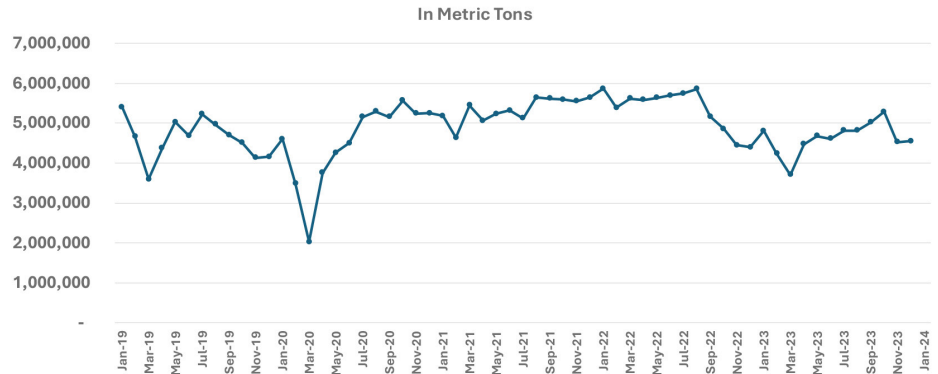
### Nuts and Taylor Swift

We couldn’t help but be amused by the Almond Board of California’s decision to counter the Super Bowl

### Exhibit 6

## Recent Containerized Import Tonnage from China

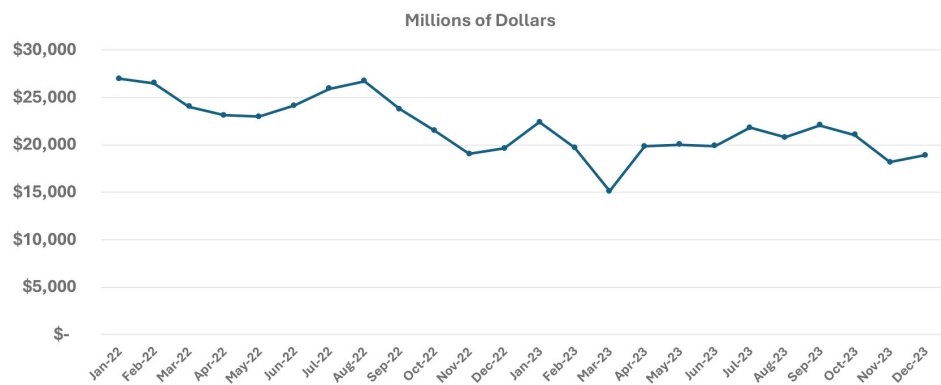
Source: U.S. Commerce Department



### Exhibit 7

## Real Value of Containerized Imports from China

Source: U.S. Commerce Department



glamour of Taylor Swift by blowing a presumably huge wad of its marketing budget on a series of promotions featuring a celebrity of their own.

Celebrity endorsements are often ironed out months in advance. In this case, the Almond Board announced last summer that Deion “Coach Prime” Sanders would be promoting its products. That was on August 23 when Coach Prime and his University of Colorado Buffaloes football team were being excessively hyped by sports journalists. It was also before

the Buffaloes took to the field and won their first three games. But bling apparently soon tarnishes in the mountain air. The Buffaloes went on to lose eight of their next nine games, finishing the season with a 4-8 record.

Some might be wondering whether the almond folks have been having any second thoughts about associating their brand with a high-profile college football coach with a losing record or whether they regret not cozying up instead with a California franchise that just happens to have



### December 2023 TEU Numbers

Continued

played in this year's Super Bowl.

While on the subject of nuts, the latest report from the Almond Board of California states that almond export tonnage in the current crop year, which began on August 1, is up 12.2% from a year earlier. Domestic shipments, by contrast, were down by 0.6%. Some 73.8% of all almond shipments between August 1 and January 31 went to foreign markets, where Coach Prime may not exactly be a known commodity.

The current crop year for walnuts and pistachios both started on September 1.

The California Walnut Board reports that exports of inshell walnuts through January were up 30.3% over the previous crop year. 96.7% of those inshell walnut shipments were exported. Shelled walnut exports meanwhile were up 18.5% year-over-year. 52.2% of all shelled walnut shipments in the current crop year went to foreign markets.

The latest data from the Administrative Committee for Pistachios, the marketing organization that supervises pistachio growers and shippers, show a 97.2% jump in exports in the current crop year through January. Foreign markets accounted for 82.8% of all pistachio shipments in the past five months.

Almost all of the commercially grown almonds, walnuts, and pistachios come from California and adjacent regions of Nevada and Arizona. But Oregon's Willamette Valley accounts for 99% of the nation's hazelnuts. About half the crop is exported to

Europe and Asia. Over 90% of exports are shipped in shell.

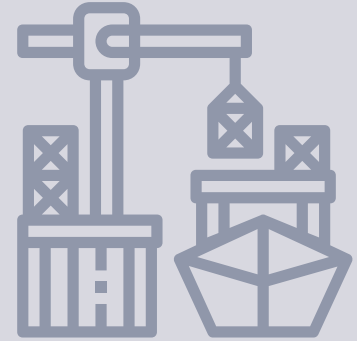
Not surprisingly, almost three-quarters of all hazelnut exports depart from the Northwest Seaport Alliance Ports of Tacoma and Seattle and the Port of Portland on the Columbia River.

#### You Say Hazelnuts; I Say "Fil-BER"?

The Hazelnut Industry Office in Aurora, Oregon claims that "filbert" is the correct name for the fruit of the *Corylus avellana* tree. However, the Oregon Filbert Commission insists on using "hazelnut". The Oregon state law that established the fruit as the official state nut says that either is acceptable.

That may be so, but there's possibly an intriguing twist to the history of the hazelnut/filbert in the Willamette Valley. It turns out that a French immigrant named David Gernot planted the first filbert trees in the valley around 1880. Being French, he likely would have pronounced filbert in the French manner, dropping the "t" and emphasizing the second syllable. Have we been mispronouncing the hazelnut's alternate name all these years?

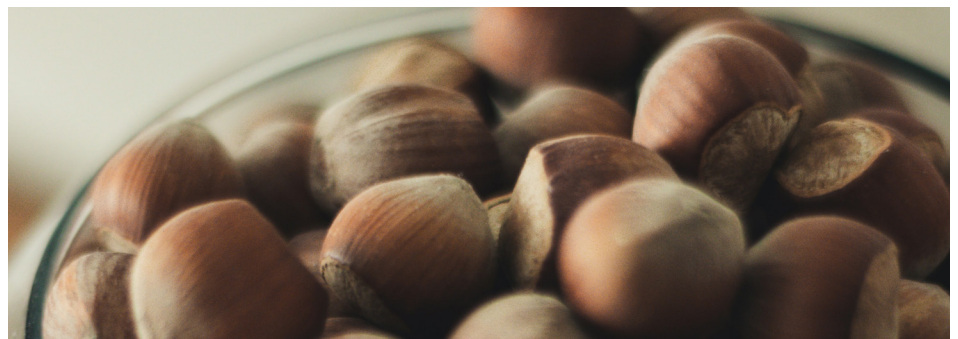
### NUMBER OF THE MONTH



# 43.9%

## THE USWC SHARE OF AMERICA'S CONTAINERIZED INBOUND LOADS FOR 2023

Source: Individual Ports





JOCK O'CONNELL'S COMMENTARY

# Wine Bottles and Bladders

Nearly every year over the past couple of decades I have learned something new by attending the annual Unified Wine & Grape Symposium (UW&GS) that's held late each January in Sacramento. The UW&GS is the largest wine industry trade show outside of Europe. It's held in California's state capital because Napa lacks a large enough convention space and because San Francisco is, well, too expensive.

Apart from panels of industry experts sharing their thoughts on a wide range of topics like the latest consumer trends to strategies for coping with the latest vineyard pest or mold, the show features hundreds of suppliers of often arcane products and technologies used in wine production. More often than not while wandering up and down the trade show aisles, I am obliged to ask: What's this thing do?

So, over the years, I've learned from the people running the labs officially certified to measure the ABV (alcohol by volume) content of wines that the actual alcohol content listed on the label may legally be off by one percent point either way. That hearty cabernet sauvignon from Napa that boasts of having an alcohol content of 15.0% could actually be veering into fortified wine category.

I have also chatted with coopers from here and abroad and listened patiently while they argued why oak barrels are far superior vessels for aging fine wine than tanks constructed of steel or aluminum or even cement. And while I've been left baffled



by chemists trying to explain to a non-science major what it is they do to maintain product quality, I was delighted to meet the falconer displaying how his birds can rid a vineyard of vine-eating rodents. Drones for keeping a close eye on maturing grapes have been a major addition to the show for the past couple of years.

I have also stumbled on intriguing stories of logistical legerdemain.

Many years ago, I encountered an elegantly attired but insufferably snooty Parisienne representing a bottle manufacturer that traced its roots to the late 19th century in Normandy's Bresle Valley. She was clearly irked at having to stand at a trade show booth in Sacramento when she had been counting on a visit to San Francisco or Napa.

Here, based on memory, is how our conversation went.

*So you are an exporter of wine bottles from France?*

*Yes and no. We also export wine bottles to California from Dubai.*

*Really? You manufacture wine bottles in a country that forbids the consumption of alcoholic beverages? I suppose you're there because of the abundance of desert sand.*

*No! [You stupid American was what I inferred from her tone.] The sand in Dubai is not suitable for making wine bottles. We source the sand from Australia.*

*Of course you do. Now let me get this straight. You are a French company that makes wine bottles...*

*No, [she interrupted me], we make only the finest wine bottles for the very expensive wines you Americans think are fine wines.*

*Okay, but you make these bottles in Dubai solely for export by using sand you import from Australia, which is like five or six thousand miles from your factory.*

*9000 kilometers, to be precise.*

*Merci. This all makes perfect sense.*

*Have a nice flight home.*



## Commentary

Continued

Months later, I was enlightened by an old friend in British intelligence who had spent much of his career in the Middle East. The Dubai factory, he told me, was likely a money loser. Its real purpose was to help the French government sell more advanced fighter aircraft and other military hardware to the United Arab Emirates.

I still haven't figured out what the Aussies got out of the arrangement other than a contract to sell sand.

Anyway, back to this year's trade show.

The topic of conversation that pervaded nearly every discussion was the fall-off in wine drinking, especially among younger people in America and Europe. Beer and spirits sales have also been receding, as anti-alcohol sentiments are spreading. Compounding the wine industry's woes right now is an over-production of grapes, especially the grapes that are typically found in bottles or boxes lining the bottom shelves of grocery stores. Premium wine sales are evidently holding their own despite frowning newspaper headlines that there is no safe level of alcohol consumption.

These developments are affecting international trade in empty wine bottles and the bulk wines that are generally shipped in bladders holding as much as 25,000 liters of wine.

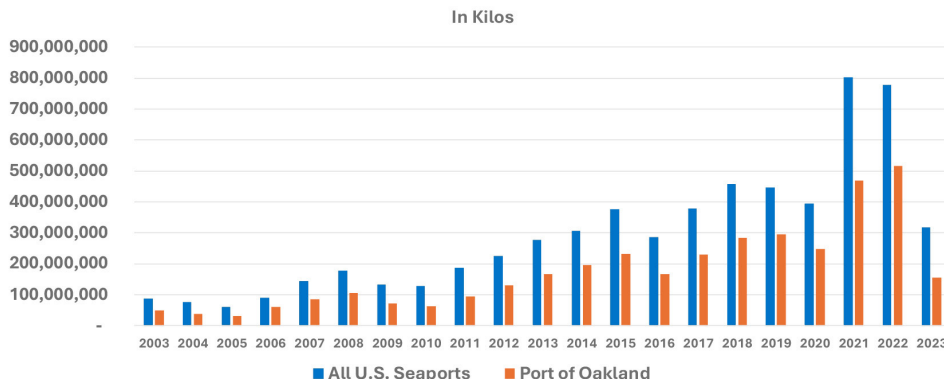
### The Empty Bottle Trade

As **Exhibit A** shows, seaborne imports of empty wine bottles grew almost steadily over the last two decades until plummeting in 2023. The chief port of entry has been the Port of Oakland due to its proximity to the wine-producing regions that

### Exhibit A

#### Seaborne Imports of Empty Wine Bottles

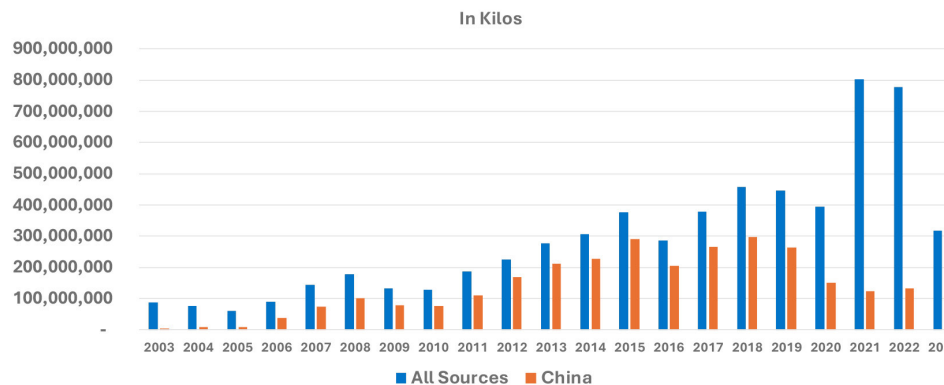
Source: U.S. Commerce Department



### Exhibit B

#### China's Share of Seaborne Imports of Empty Wine Bottles

Source: U.S. Commerce Department



stretch from California's North Coast to the southern San Joaquin Valley. Nationally, the trade peaked in 2021 at 801,807,160 kilograms before slipping by 3.0% in 2022 and then plunging to 328,534,563 kilograms last year. At the Port of Oakland, import tonnage, which had crested in 2022 at 514,394,249 kilograms fell some 70.0% to 154,079,747 kilograms last year.

A key development in the declining import trade has been the increased bottle production in North America.

Notably, Mexico has replaced China as the largest source of empty wine bottles. Indeed, China's share of the trade has been faltering since a 25% tariff on Chinese bottles went into effect at the end of 2019. Almost all Mexican bottles are shipped overland by truck or rail. Reflecting Mexico's growing role as a source of empty wine bottles, U.S. import statistics indicate that 22.8% of the \$523.84 million in empty wine bottle imports arrived through the San Diego



Commentary

Continued

Customs District from Mexican suppliers.

Despite the sharp fall-off in imports from China, it remained the top overseas supplier with a 30.8% share of the maritime import trade last year. Chile was next with a 10.8% share, followed by India (9.4%), Taiwan (8.7%), and the United Arab Emirates (7.0%).

Chateau de Firebaugh

California’s exporters of bulk wines have also been seeing declining volumes of trade. Produced largely in the southern San Joaquin Valley between Lodi and the Grapevine, these unpretentious wines are usually blended with other wines to alter taste, color or alcohol content or packaged in bottles or boxes at the lower-end of the wine market. When shipped abroad, bulk wines travel not in bottles but rather in large bladders loaded into containers for ocean transport. The largest overseas market for California bulk wine is the United Kingdom.

As Exhibit D reveals, the top market for bulk wine shipments from the Port of Oakland has long been the United Kingdom. That’s not necessarily because the British are enchanted with relatively cheap wines from California. It’s because much of the trade involves bottling facilities in Britain that ship bottled wine on to markets throughout Europe. The labels on these bottles seldom allude to a winery anyone cognizant of California wines would recognize. Instead, the labels often bear the name of a fictitious winery from an indistinct appellation.

Is it any wonder that Europeans – including those flogging empty wine bottles at a trade show in Sacramento – might instinctively regard California wines as just so much plonk.

Exhibit C

U.S. Wine Exports

Source: U.S. Commerce Department

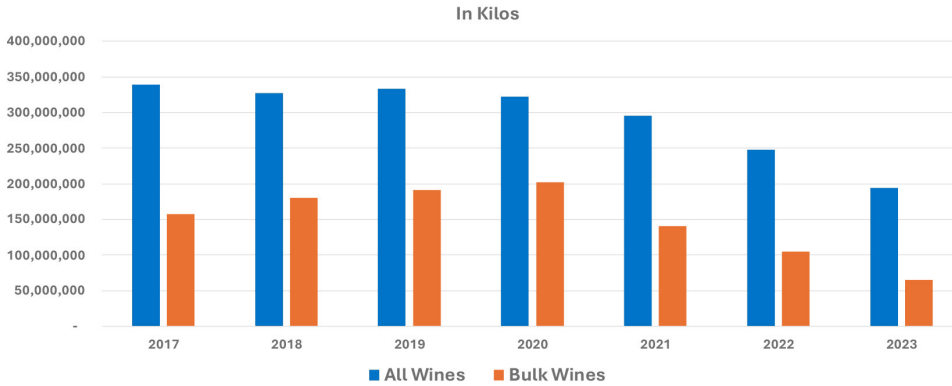
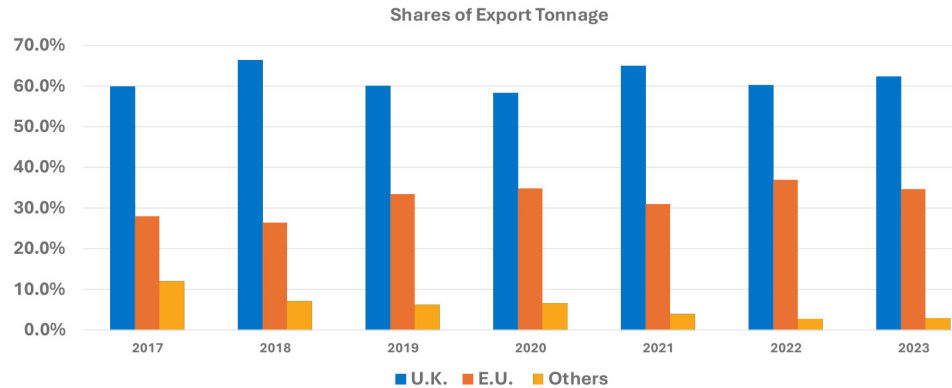


Exhibit D

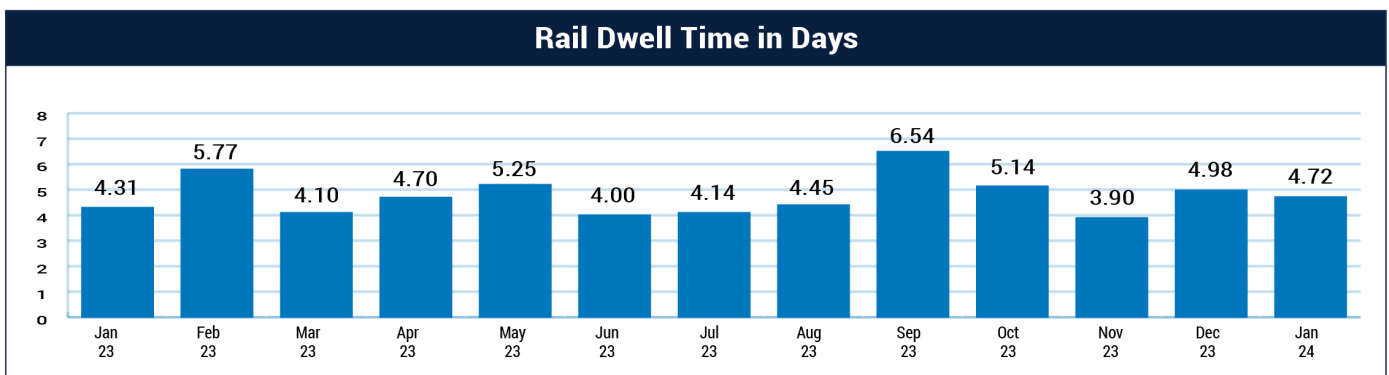
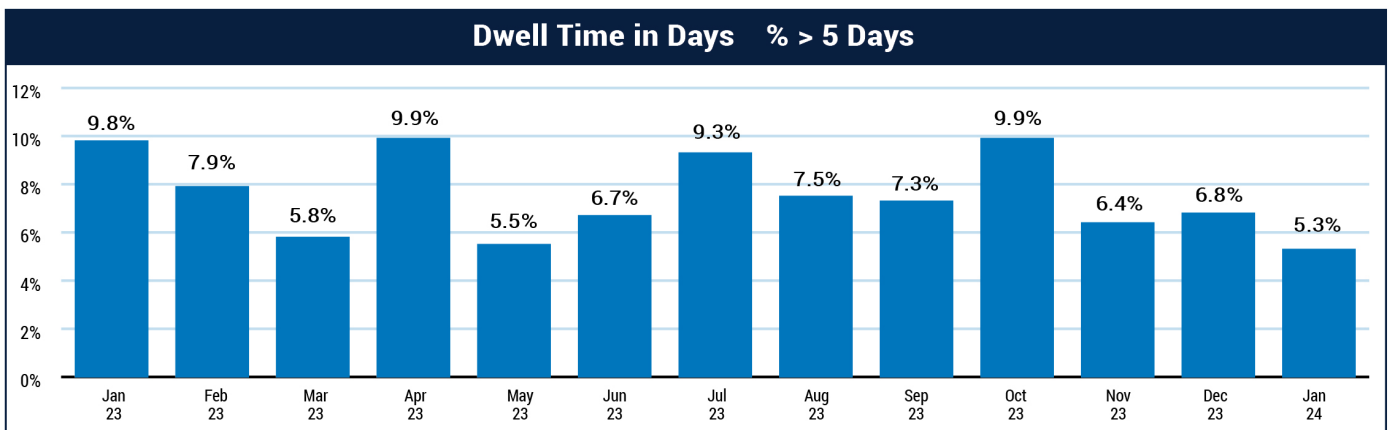
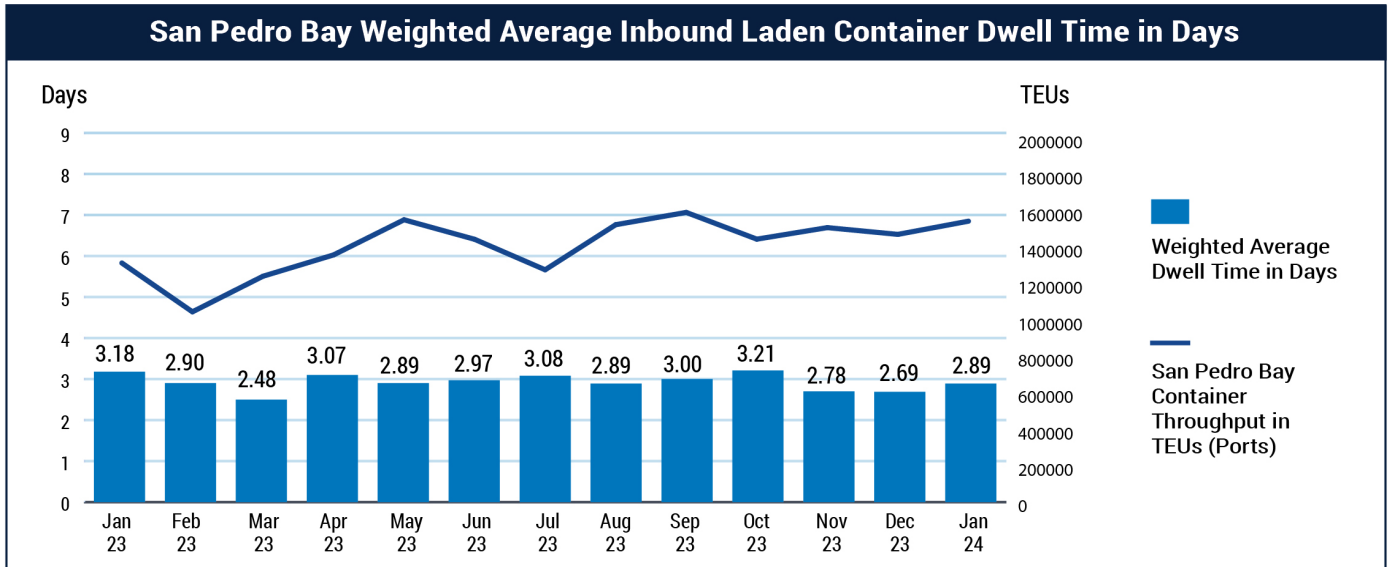
Top Destinations of Bulk Wine Exports from Port of Oakland

Source: U.S. Commerce Department





# San Pedro Bay Ports Truck and Rail Dwell Time Remains Steady for Month of January



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**State of Washington  
Pilotage Commission  
March 12, 2024**

**Grays Harbor District Report**

There were 9 arrivals in February: 6 dry bulkers, 1 liquid bulkers, and 2 RoRo's. There were 30 pilot jobs in February. Year to date there have been 19 arrivals: 11 dry bulkers, 4 liquid bulkers, 1 logger and 3 RoRo's for a total of 52 pilot jobs.

There are 7 vessels scheduled for March: 5 dry bulkers, 1 liquid bulkers and 1 RoRo.

**Dredging**

American Construction mobilized to Terminal 1 on February 10<sup>th</sup> at 1000. They dredged Terminal 1 most of the day on the 10<sup>th</sup>, while waiting for Terminal 2 to become open. Early February 11<sup>th</sup>, they mobilized to Terminal 2 to begin dredging. They completed Terminal 2 in the afternoon on February 12<sup>th</sup>. Post Dredge surveys were completed later that week and staff are waiting for those results. Preliminary volume estimates are roughly 15,000 CY, much of the quantity coming from Terminal 2. Post Dredge reports will be sent to the agencies shortly. American completed a couple more days of Corps Channel dredging in front of Terminal 4 before the window closed on February 14<sup>th</sup>.

# PUGET SOUND PILOTAGE DISTRICT ACTIVITY REPORT

**Feb-2024**

The Board of Pilotage Commissioners (BPC) requests the following information be provided to the BPC staff **no later than two working days prior to a BPC meeting** to give Commissioners ample time to review and prepare possible questions regarding the information provided.

Activity									
Total pilotage assignments:	610			Cancellations:	15				
Total ship moves:	595	Cont'r:	154	Tanker:	196	Genl/Bulk:	144	Other:	101
Assignments delayed due to unavailable rested pilot:				5	Total delay time:	10		hours	
Assignments delayed for efficiency reasons:				17	Total delay time:	30.25		hours	
Billable delays by customers:				44	Total delay time:	93			
Order time changes by customers:				162					
2 pilot jobs:	46	Reason:	PSP GUIDELINES FOR RESTRICTED WATERWAYS						
Day of week & date of highest number of assignments:	Saturday 2/3/24					30			
Day of week & date of lowest number of assignments:	Sunday 2/11/24					9			
Total number of pilot repositions:	123	Upgrade trips	14	YTD	37				
3 consecutive night assignments:	30	YTD	61						

Callback Days/Comp Days					
	Starting Total	Call Backs (+)	Used (-)	Burned (-)	Ending Total
Licensed	2588	87	43		2632
Unlicensed	5			5	0
<b>Total</b>	<b>2593</b>				<b>2632</b>

**On watch assignments 515      Call back assignments 95      CBJ ratio 15.57%**

Pilots Out of Regular Dispatch Rotation (pilot not available for dispatch during "regular" rotation)

A. Training & Continuing Education Programs					
Start Dt	End Dt	City	Facility	Program Description	Pilot Attendees
13-Feb	14-Feb	Seattle	PMI	ULCV	BOU(on 2*),KRI (off 2), SEA(on 2*)
20-Feb	20-Feb	Seattle	PMI	Azipod	BOU, COL, KEP, LOB, MEL
21-Feb	21-Feb	Seattle	PMI	APA-Legal aspects of piloting	COL
22-Feb	29-Feb	Sydney AU	Port Ash	Manned Model	CAW(on 6*, off 2)
24-Feb	26-Feb	Port Angeles	Pilot Boats	Pilot Fall Arrest System training	HAM (on 3*)
1-Feb	29-Feb			Upgrade Assignments On Duty	MIL (1*), STA (1*)
1-Feb	29-Feb			Upgrade Assignments Off Duty	GRK (2), HOA(2), KNU(1), MIL(1), SEA(1), STA (2), VEL (3)
					*On watch    Off watch    ** paired to assign.
					15            21

B. Board, Committee & Key Government Meetings (BPC, PSP, USCG, USACE, Port & similar)					
Start Dt	End Dt	City	Group	Meeting Description	Pilot Attendees
1-Feb	1-Feb	Seattle	BPC	BPC Exam Prep	BEN, GRK*, SCR
2-Feb	2-Feb	Seattle	BPC	BPC Exam Prep	BEN, GRK*
2-Feb	2-Feb	Seattle	PSP	Quiet Sound	KAL, SEA
2-Feb	2-Feb	Seattle	PSP	NWSA	LOB
5-Feb	6-Feb	Seattle	PSP	West Coast Pilot Conference	KLA, MCG
6-Feb	6-Feb	Seattle	BPC	OTSC	BOU**
7-Feb	7-Feb	Seattle	PSP	Harbor Safety Committee	KAL
8-Feb	8-Feb	Seattle	PSP	Rate Committee	GRK*, KLA, KNU, MCG
13-Feb	13-Feb	Seattle	PSP	Pension	GRD*, GRK*, MIE, MIL

Start Dt	End Dt	City	Group	Meeting Description	Pilot Attendees
13-Feb	13-Feb	Seattle	BPC	OTSC	HUP*
14-Feb	14-Feb	Seattle	BPC	BPC Exam Beta	BEN, GRK, SCR*
14-Feb	14-Feb	Seattle	BPC	TEC	ANT*
14-Feb	14-Feb	Seattle	BPC	Exam App Review	ANT*, KNU
15-Feb	15-Feb	Seattle	BPC	BPC Exam Beta	BEN, GRK, SCR*
15-Feb	15-Feb	Seattle	BPC	BPC	ANT*, BEN, KNU*
15-Feb	15-Feb	Seattle	PSP	NWSA	BOU, LOB
15-Feb	15-Feb	Seattle	PSP	Ladder Safety	HAM
16-Feb	28-Feb	Seattle	PSP	President	KLA(on 13*)
26-Feb	26-Feb	Seattle	BPC	BPC Exam	BEN*
27-Feb	27-Feb	Seattle	PSP	BOD	GRK, HAM, HUP, KLA*, MCG*, MYE
28-Feb	28-Feb	Seattle	BPC	OTSC	BOU*
28-Feb	28-Feb	Seattle	PSP	Outreach-Diversity	BEN*, BOZ, MYE
28-Feb	28-Feb	Seattle	USCG	FCP	COL
28-Feb	28-Feb	Seattle	PSP	Propeller Club	ROU
28-Feb	28-Feb	Seattle	PSP	Outreach-QCYC (Vessel Traffic)	ANT
29-Feb	29-Feb	Seattle	PSP	Pilot Boats	COR*, MAN*, ROU, SEM*
29-Feb	29-Feb	Seattle	PSP	President	GRK

* On Watch	Off Watch	** paired to assign.	
33	34	1	

**Safety/Regulatory**

**Outreach**

**Administrative**

**C. Other (i.e. injury, not-fit-for-duty status, COVID risk)**

Start Dt	End Dt	REASON	PILOT
1-Feb	29-Feb	NFFD	SES

Number of assignments during the 12 months prior to setting the number of pilots at 56 at the July 2019 065 hearing.  
7,101  
Number of assignments during the last 12 months (March 2023-February 2024).  
7,256

# Puget Sound District Activity Report Dashboard

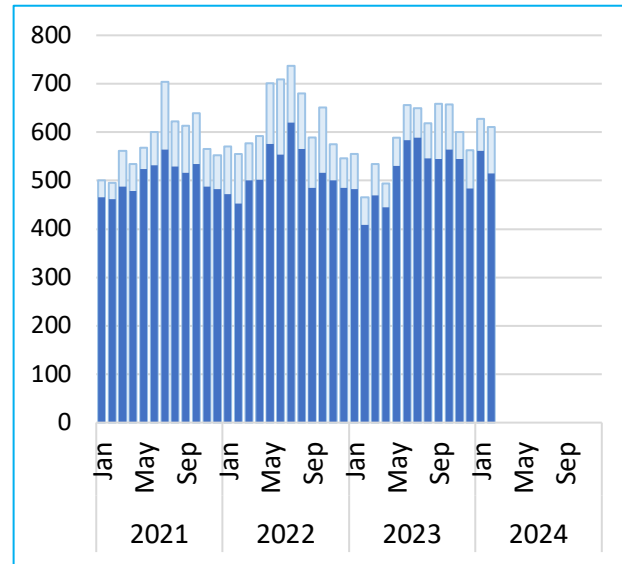
2024 February

Licensed Pilots  
Including President  
**54**

PS District  
Trainees  
**7**

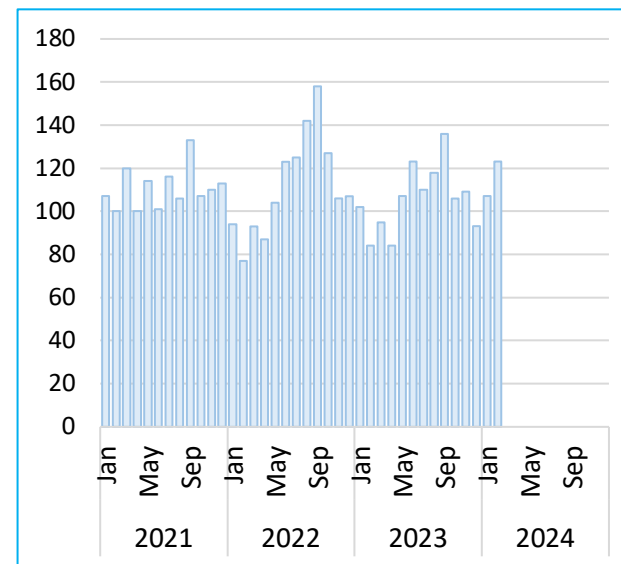
No changes in January.

Total Assignments  
**610**



515 On-Watch (dark blue), 95 Off-Watch (light blue)

Repositions  
**123**



Licensed Pilots w/o Pres **53**  
Pilots NFFD entire month **1**  
Available Pilots **52**

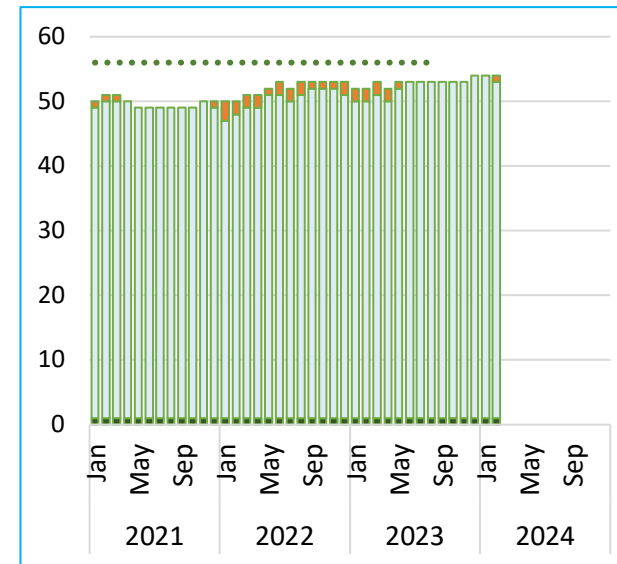
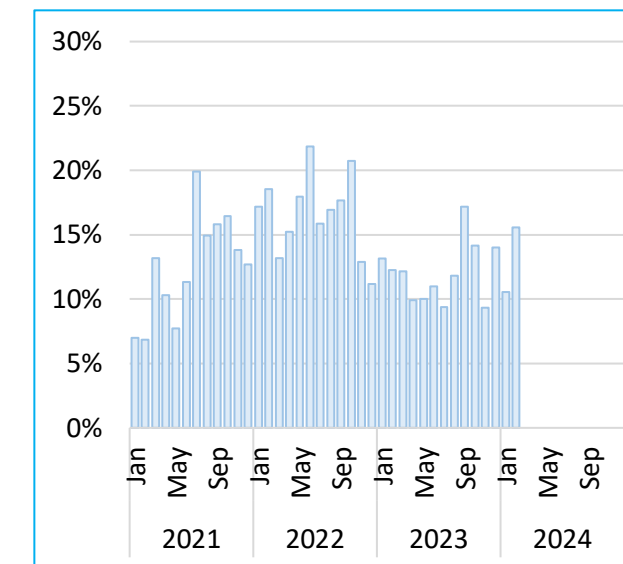
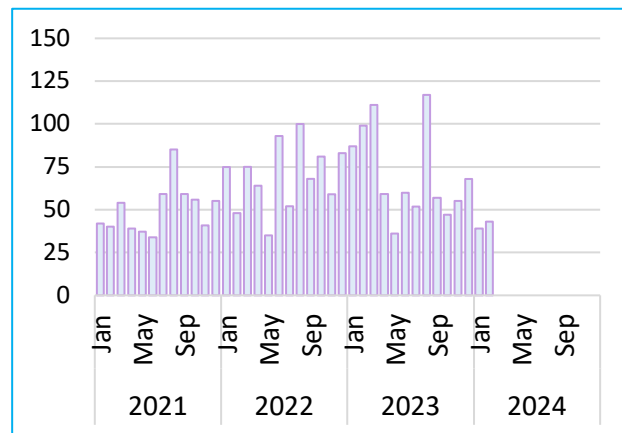


chart also includes president (1 pilot)

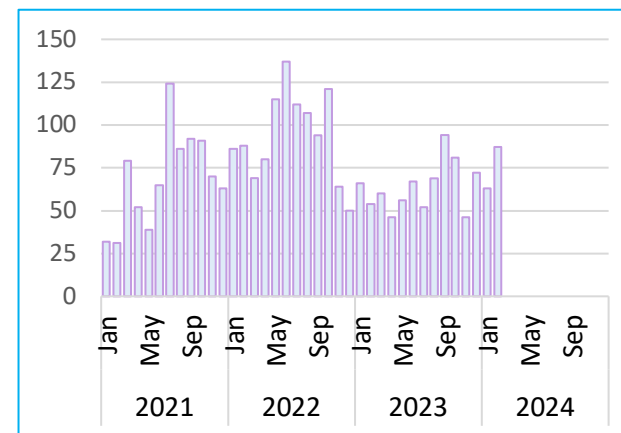
Off-Watch Assignments  
(Callbacks)  
**16%**



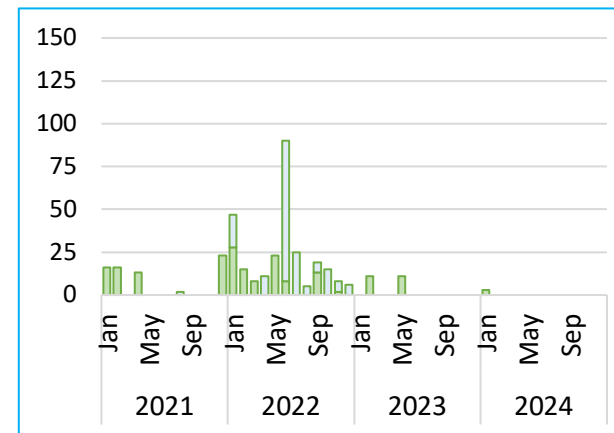
Comp Days Used  
(Licensed Pilots)  
**43**



Comp Days Earned  
(Callbacks)  
**87**

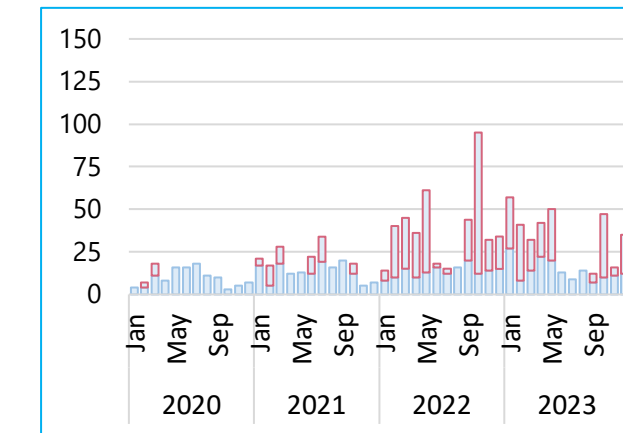


COVID Days\* **0**  
NFFD Days\* **0**



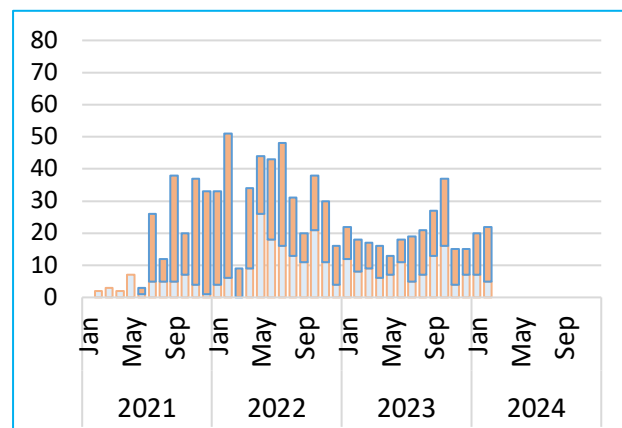
count of NFFD days if pilot(s)  
not NFFD whole month

Training Days **23**  
Upgrade Trips **14**



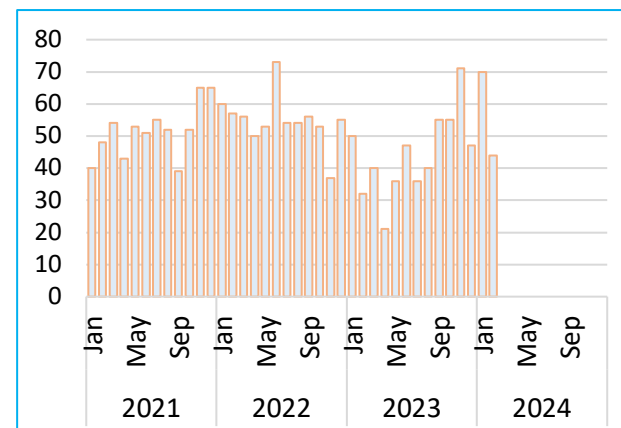
training days (red) stacked  
on upgrade trips (blue)

Pilot Delays (Count)  
combined total  
**22**

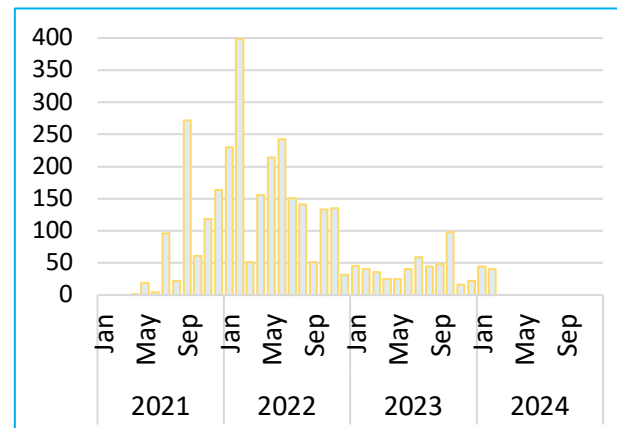


efficiency delay counts stacked on top  
of pilot shortage delay counts on bottom

Billable Delays (Count)  
by Customers  
**44**

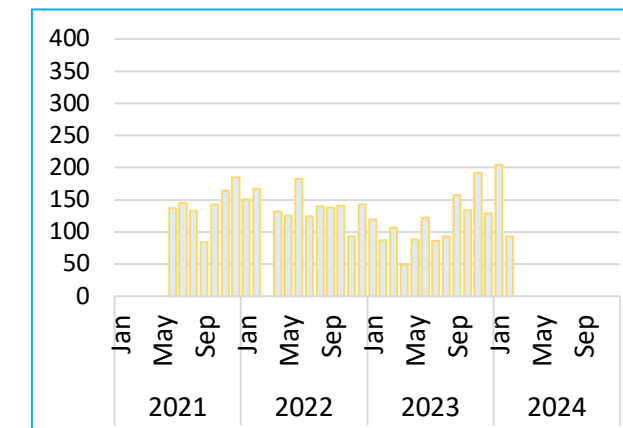


Pilot Delay Hours  
(Pilot Shortage & Efficiency)  
**40.25 hrs**



total pilot delay hours (not separated into  
efficiency & pilot shortage components)

Billable Delay Hours  
by Customers  
**93 hrs**





STATE OF WASHINGTON  
**BOARD OF PILOTAGE COMMISSIONERS**

**TUG ESCORT IDEAS  
 AND  
 ENVIRONMENTAL ELEMENTS  
 FOR  
 SEPA ANALYSIS**

ESHB 1578 *Reducing the threat to southern resident killer whales by  
 improving the safety of oil transportation*  
 and  
 Chapter 88.16 RCW Pilotage Act  
[88.16.190 Oil Tankers-Restricted Waters-Requirements](#)

**ESCORT IDEAS TO BE EVALUATED (Reasonable Alternatives WAC 197-11-786)**

Notes on Voting for Escort Ideas (Reasonable Alternatives):

Voting to include an alternative is NOT necessarily a vote in support of that alternative as the final rule language. A vote in support of an alternative says that:

- A. There is information that we can learn to support decision-making by comparing this alternative to other alternatives and
- B. This alternative should remain under consideration.

Alternatives should be those that “could feasibly attain or approximate a proposal's objectives, but at a lower environmental cost or decreased level of environmental degradation. Reasonable Alternatives may be those over which an agency with jurisdiction has authority to control impacts, either directly, or indirectly through requirement of mitigation measures” ([WAC 197-11-786](#)).

**1. Remove Rosario and waters east requirement (Pre-2020):**

Remove escort requirement for laden tank barges and ATBs over 5,000 DWT and oil tankers between 5,000 and 40,000 DWT, while not engaged in bunkering, in Rosario Strait and connected waters east.

Considerations:

- a. Could result in an increase in oil spill risk
- b. Could reduce tug escort traffic and related impacts



**Discussion:**

<b>Recommendation: Yes, include in analysis (3)</b>	<b>Oil/Tribe/Envi:</b> Include to help understand the benefits of escort.
<b>Dissent: No – don’t include in analysis (2)</b>	<b>Tug:</b> Remove to allow more time on other alternatives, we already have experience with the results of this action from the recent years.

	<b>Pilot:</b> Remove from consideration since escort here are a risk reducing measure that it doesn't make sense to take away.
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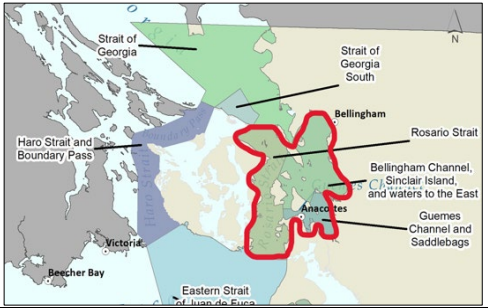
**2. Maintain Rosario and waters east requirement (no change):**

Maintain escort requirement for laden tank barges and ATBs over 5,000 DWT, and oil tankers between 5,000 and 40,000 DWT, while not engaged in bunkering, in Rosario Strait and connected waters east.

Considerations:

- a. No action alternative.
- b. BPC is required to consider this alternative in the EIS.

**Discussion:**



<b>Recommendation: Yes, include in analysis</b>	It is required.
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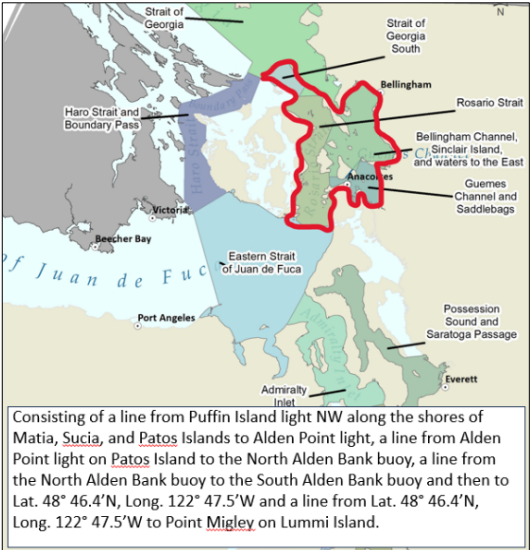
**3. Expand 2020 escort requirements to the waters of Strait of Georgia South, and a corner of Strait of Georgia:**

Expand current escort requirement for laden tank barges and ATBs over 5,000 DWT and oil tankers between 5,000 and 40,000 DWT, while not engaged in bunkering, to the waters of Strait of Georgia South, and a corner of Strait of Georgia.

Considerations:

- a. Strait of Georgia South zone is adjacent to current escort area.
- b. The model showed this zone to have a high escort efficiency.
- c. OTSC pilot representative agreed that the characteristics of this zone make it a good candidate for an escort requirement.

**Discussion:**



<b>Recommendation: Yes, include in analysis (5)</b>	Helpful to include.
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**4. Expand 2020 escort requirements to Haro Strait and Boundary Pass:**

Expand current escort requirement for laden tank barges and ATBs over 5,000 DWT and oil tankers between 5,000 and 40,000 DWT, while not engaged in bunkering, to Haro Strait and Boundary Pass.



**Considerations:**

- a. Any BPC expansion of escort requirements to Haro/Boundary would apply within the territorial boundaries of Washington and to the extent provided by law and treaty.
  - i) Escorting of vessels not inbound or outbound for a US port would only be possible if the United States Coast Guard agreed to consult with Canada before such requirement were made.
  - ii) Escorting of vessels inbound or outbound from US ports would be possible but would be a smaller subset of vessels and would bring a level of implementation complexities.
- b. The model found Haro/Boundary had the highest risk reduction in oil volume at risk and escort efficiency. Escorts here also have indirect benefits.

**Discussion:**

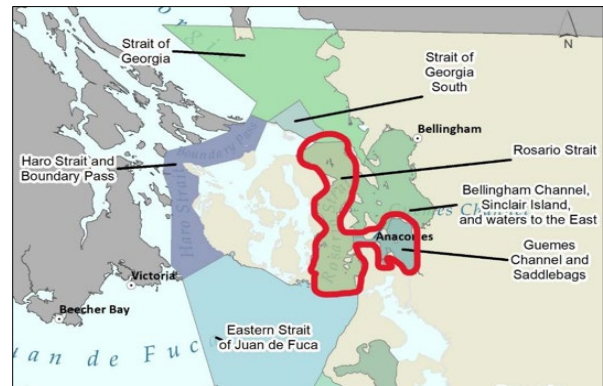
<p><b>Recommendation: Yes, include in analysis (4)</b></p>	<p><b>Tug:</b> From an EIS standpoint the environmental benefits don't acknowledge the border, recommend including.  <b>Pilot:</b> Very environmentally complex area, recommend including.  <b>Envi:</b> Support including.  <b>Oil:</b> Can support as an option.</p>
<p><b>Dissent: No – don't include in analysis (1)</b></p>	<p><b>Tribal:</b> Recommend not moving forward due to transboundary challenges.</p>

**5. Remove requirements in Bellingham Channel and waters east:**

Remove escort requirements in Bellingham Channel and waters east for laden tank barges and ATBs over 5,000 DWT, and oil tankers between 5,000 and 40,000 DWT.

**Considerations:**

- a. Out of the three zones that make up Rosario and connected waters, the Bellingham Channel and waters east zone shows the lowest benefit from escorts.



**Discussion:**

<b>Recommendation: Yes, include in analysis (3)</b>	<b>Tug:</b> Include to increase understanding. <b>Oil:</b> Can support. <b>Tribal:</b> Can support.
<b>Dissent: No – don’t include in analysis (2)</b>	<b>Pilot:</b> Do not support. Disagree with continuing this as an option since Bellingham channel has high current and is rocky, curvy, and dangerous. <b>Envi:</b> Do not support. Concerned that the model doesn’t do a good job of representing the removal of the channel.

**ELEMENTS OF THE ENVIRONMENT (for inclusion in EIS scope)**

*Note: See supplemental handout for additional details. Asterisk (\*) indicates that the element has been identified as a priority by the OTSC.*

<b>Element of the Environment Under Consideration</b>	<b>OTSC Majority Recommendation</b>
*Air quality and greenhouse gas emissions	Yes, include
Water quality	Yes, include
*Plants and animals (incl. SRKW and marine mammals)	Yes, include
Energy and natural resources	Yes, include
*Environmental health: releases (oil spill)	Yes, include
*Environmental health: noise (incl. underwater noise and ambient/operational noise)	Yes, include
Aesthetics, light, and glare	Yes, include
*Tribal natural and cultural resources	Yes, include
Historic and cultural resources (other, non-tribal)	No, do not include
*Transportation: vessel traffic	Yes, include

**Discussion:**

<b>Recommendation: Evaluate list as shown in slide (copied here). The 6 items with icons are the highest priority (asterisks in table above).</b>
<b>Dissent – SRKW, Underwater Noise, Air emissions, vessel traffic, oil spill risk, and treaty fishing impacts should be included, but the rest of these appear de minimis and not having significant adverse impacts (Envi)</b>



# Environmental Impact Statement Preliminary Scope: Supplemental Material for BPC Consideration



## Relevant Notes:

- “Other EISs” includes review of previous EISs that include increases in vessel traffic as part of their assessment including: BP Cherry Point Dock, Westway-Contanda Expansion, Tesoro Savage Vancouver Energy Distribution Terminal, Millenium Bulk Terminals, and Buzzards Bay Regulated Navigation Area.
- The EIS will also consider environmental justice impacts.
- Asterisks (\*) indicate an element that the OTSC has identified as a priority. These will be the focus of our resources and of more in-depth assessments in the EIS.
- The second column “In EIS? (VOTE)” reflects the OTSC recommendation to the BPC.

Element (VOTE)	In EIS? (VOTE)	Proposed Type of Analysis (Informational)	Summary of Rationale (Informational)
*Air Quality and GHG Emissions	Yes	<ul style="list-style-type: none"> <li>• Quantitative assessment of GHG emissions</li> <li>• Dispersion modeling</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> No</li> <li>• <b>Comments:</b> Yes, air quality and GHG emissions have been highlighted in comment letters including emissions from increased transits and idling time, consider WA and industry GHG emissions reduction goals, emissions would be incremental compared to existing levels.</li> <li>• <b>Other EISs:</b> Included an assessment (except Buzzards Bay NEPA) with dispersion modeling. Most found no significant impact.</li> <li>• <b>Other Notes:</b> Marine vessels are a major source of nitrogen dioxide and sulfur dioxide in our region.<sup>1</sup> Risk of concentrating air emissions in already overburdened communities. Initial DOH recommendation is supportive of dispersion modeling.</li> </ul>

<sup>1</sup> Puget Sound Clean Air Agency. (2022). *2022 Air Quality Data Summary*. Puget Sound Clean Air Agency Data Summary. <https://pscleanair.gov/615/Data-Summary>

Element (VOTE)	In EIS? (VOTE)	Proposed Type of Analysis (Informational)	Summary of Rationale (Informational)
Water Quality	Yes	<ul style="list-style-type: none"> <li>• Desktop analysis/ Literature review</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> No</li> <li>• <b>Comments:</b> No initial comments but discussed at the Scoping Workshop. The focus of initial DS for this topic was around incidental ballast or waste discharge. Scoping Workshop comments were consistent: tugs may have incidental grey water or wash water discharges, see Vessel General Permits (hydraulic fluid spills, chain locker, effluent, deck runoff, gray water discharges, etc.). Note that oil spill risk is covered separately.</li> <li>• <b>Other EISs:</b> Included an assessment (except Buzzards Bay NEPA), found no significant impact.</li> <li>• <b>Other Notes:</b> Study area is within No Discharge Zone in Puget Sound, so sewage discharge is not allowed. We assume with the NDZ compliance in the assessment.</li> </ul>
*Plants and Animals	Yes	<ul style="list-style-type: none"> <li>• Review of existing data and studies</li> <li>• Spatial data available through Ecology as needed</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> Yes, intent and direction of the bill is SRKW protection.</li> <li>• <b>Comments:</b> Yes, focus of many comments received so far, primarily about SRKW – including underwater noise and physical disturbance impacts, oil spill risk, local extinction risk.</li> <li>• <b>Other EISs:</b> Yes, all included assessment of plants and animal impacts including marine mammals.</li> <li>• <b>Other Notes:</b> Several threatened and endangered species within the study area, SRKW in particular, other marine mammals.</li> </ul>
Energy and Natural Resources	Yes	<ul style="list-style-type: none"> <li>• High-level desktop quantitative assessment</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> No</li> <li>• <b>Comments:</b> Not the focus of initial comments. The Rule Team asked about this element at the Scoping Workshop. Comments there included request to consider use of alternative fuels by escort tugs. Industry indicated that they did not see a major change in fuel demand from 2019 – 2020. More escorts translate to more fuel use by escort tugs. Higher fuel use while escorting.</li> <li>• <b>Other EISs:</b> Most assessed (Buzzards Bay eliminated entirely), but none found significant impact (not likely to need additional fuel resources that don't currently exist in the region).</li> <li>• <b>Other Notes:</b> “Modern tugs, with power ratings of 3,000 to 5,000 hp, burn large amounts of fuel when operating at full rpm — anywhere from 100 to 200</li> </ul>

Element (VOTE)	In EIS? (VOTE)	Proposed Type of Analysis (Informational)	Summary of Rationale (Informational)
			gallons per hour for a harbor tug pushing against a ship, or up to 3,000 to 5,000 gallons per day when towing a loaded barge in ocean conditions.” <sup>2</sup>
*Environmental Health – Releases (Oil Spill)	Yes	<ul style="list-style-type: none"> <li>• Ecology risk model to generate spill risk and quantity estimates</li> <li>• Literature review</li> <li>• Cross-reference with Plants and Animals, Water Quality section as needed.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> Yes, intent and direction of the bill is oil spill risk reduction.</li> <li>• <b>Comments:</b> Yes, potential for spill risk reduction as well as potential increases due to additional tug traffic, concerns about spill risk when fueling and bunkering.</li> <li>• <b>Other EISs:</b> All similar example EISs with vessel traffic included assessment of oil spill risk (a significant impact).</li> <li>• <b>Other Notes:</b> This section will discuss reduction in oil spill risk/volume as a result of various alternative rule approaches where relevant. Will include risks associated with fueling and bunkering. Would review and reference the existing modeling reports and literature on tug escorts. Should also incorporate future transportation of alternative fuels in release considerations.</li> </ul>
*Environmental Health (Noise: underwater and operational/ ambient)	Yes	<ul style="list-style-type: none"> <li>• To include underwater noise modeling</li> <li>• Literature review</li> <li>• Cross-reference with Plants and Animals section as needed.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> Yes, agencies to consider underwater noise in the rulemaking.</li> <li>• <b>Comments:</b> Yes, focus of many comments including: noise while transiting as well as while escorting (need to understand masking effect, sound profiles while escorting/deadheaded), impacts to SRKW and marine mammals, mitigation challenges and suggestions. Important to consider that underwater noise is not always additive, things like constructive interference must be considered. If the tug with the barge and the escort tug are not running at the same RPM the underwater noise impact could be worse. Use of sound signals in fog and low visibility can also impact noise/aesthetics but are unavoidable for safety measures (consider foghorns, generators, engines). Tugs often do maintenance at anchor which can be very loud.</li> <li>• <b>Other EISs:</b> Many only included operational noise from vessels and did not assess underwater noise (Cherry Point a notable exception). Buzzards Bay eliminated it entirely. This assessment would also consider operational noise.</li> </ul>

<sup>2</sup> Professional Mariner Staff. (2008). *Fuel management for tugs becoming an increasing challenge*. Professional Mariner. <https://professionalmariner.com/fuel-management-for-tugs-becoming-an-increasing-challenge/>

Element (VOTE)	In EIS? (VOTE)	Proposed Type of Analysis (Informational)	Summary of Rationale (Informational)
			<ul style="list-style-type: none"> <li>• <b>Other Notes:</b> We will continue to coordinate with Quiet Sound and the Port of Vancouver’s ECHO Program on underwater noise modeling, measurement, and science, per comments.</li> </ul>
Aesthetics, Light and Glare		<ul style="list-style-type: none"> <li>• Literature review</li> <li>• Mapping as needed</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> No</li> <li>• <b>Comments:</b> No, not a focus of comments so far. The Rule Team asked about this at the workshop and heard that it’s the less frequently used anchoring locations that typically raise noise or light complaints. If tugs anchor in these locations to await the next job, then this could be an issue. Recommendation to seek information about noise and light complaints from US Coast Guard.</li> <li>• <b>Other EISs:</b> Included (except Buzzards Bay), finding of no significant impact.</li> </ul>
Recreation	Yes	<ul style="list-style-type: none"> <li>• Literature review</li> <li>• Spatial analysis for conflicts</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> No</li> <li>• <b>Comments:</b> Not a focus of comments except maybe NGO coalition question about fixed fishing gear. No additional comments at the Scoping Workshop.</li> <li>• <b>Other EISs:</b> All example EISs with vessel traffic impacts assessed recreational impacts. Some found impacts related to wildlife viewing, recreational fishing noted, some found no significant impact.</li> <li>• <b>Other Notes:</b> Our DS notes also included looking into potential impacts to recreational boating, fishing, and whale watching.</li> </ul>
*Tribal Natural and Cultural Resources	Yes	<ul style="list-style-type: none"> <li>• Methods TBD in partnership with interested Tribes</li> <li>• Will include literature review, publicly available statements</li> <li>• Could include spatial analysis if desired by Tribes</li> </ul>	<ul style="list-style-type: none"> <li>• <b>In ESHB 1578:</b> Yes, agencies to consider and minimize impacts to treaty rights, treaty fishing, tribal interests in the rulemaking.</li> <li>• <b>Comments:</b> Yes, this is a focus of comments received so far including needing to understand geographic distribution of new tug traffic and tug-specific impacts to treaty fishing.</li> <li>• <b>Other EISs:</b> Yes, assessment of tribal and cultural resources included.</li> <li>• <b>Other Notes:</b> The U&amp;A of many federally recognized Tribes overlaps with the study area. Previous statements (e.g. Swinomish appendix in 2019 Vessel Traffic Report) highlighted and shipping lanes take up 27% of the waters of the Salish</li> </ul>

Element (VOTE)	In EIS? (VOTE)	Proposed Type of Analysis (Informational)	Summary of Rationale (Informational)
			Sea (U&A fishing territory) and that gear loss, safety hazards, lost fishing opportunity are all primary concerns. <sup>3</sup>
Historic/Cultural Resources (Other)	No	<ul style="list-style-type: none"> <li>High-level spatial analysis to identify any non-tribal cultural resources</li> </ul>	<ul style="list-style-type: none"> <li><b>In ESHB 1578:</b> No</li> <li><b>Comments:</b> No. We asked about this at the Scoping Workshop and received no comments or support for including it in the assessment.</li> <li><b>Other EISs:</b> No</li> <li><b>Other Notes:</b> Resources at Risk layer looked like it was mostly lighthouses and coastal buildings (no shipwrecks or submerged resources), so likely not a significant risk.</li> </ul> <p><i>Note: Will verify with DAHP to confirm (may be added in if they indicate that it should be included).</i></p>
*Transportation – Vessel Traffic	Yes	<ul style="list-style-type: none"> <li>Ecology risk model to generate vessel traffic risk information</li> <li>Literature review</li> <li>Expert elicitation/focus groups TBD</li> </ul>	<ul style="list-style-type: none"> <li><b>In ESHB 1578:</b> Yes, adds vessel traffic and is focused on closing safety gaps related to vessel traffic.</li> <li><b>Comments:</b> Yes, comments on this topic received so far include increasing vessel traffic could change collision, congestion, and navigational safety risks, increases in underway time, reduction in available tugs for emergency tugs of opportunity, limited availability of pump out services, consistency with Canadian regulations, need to understand geographic distribution of changes. Recommended to consider active versus deadheaded escort vessel transits.</li> <li><b>Other EISs:</b> Yes, assessment of vessel traffic is included.</li> </ul>

<sup>3</sup> Washington State Department of Ecology. (2021). *Vessel Activity Synopsis Maritime activity in the northern Puget Sound and Strait of Juan de Fuca* (Publication 21-08-008). Appendix B: Swinomish Tribe Statement and Fishing Data. [2108008.pdf \(wa.gov\)](#)



**2024**

**Women on the Water  
Conference**

**FEBRUARY 29 - MARCH 2**

**Massachusetts Maritime Academy**



U.S. Department of Transportation  
**Maritime Administration**

## THURSDAY, FEBRUARY 29

- 1300 - 1600 **Registration / Check-in**  
Admirals Hall Lobby, Harrington Hall  
  
Shuttle Service is available from the Hampton Inn between 1400-1600.
- 1600 - 1615 **Welcome and Opening Remarks**  
Admirals Hall. Harrington Hall  
  
Mary Regina Thomann '81  
Vice Chair, Massachusetts Maritime Academy Board of Trustees
- 1615 - 1715 **Panel 1: Allyship / Mentoring**  
Admirals Hall, Harrington Hall  
**Sponsored by Hornbeck Offshore Services**  
  
Moderator: Captain Elizabeth Simmons, Massachusetts Maritime Academy  
  
Tamekia Flack, Deputy Administrator, MARAD  
Captain Lauren Lamm, Sea Machines Robotics  
Laura McFalls, Women Offshore  
Carol Oldham, Oceantic Network
- 1715 - 1815 **Networking / Social Hour**  
Maritime Conference Center  
**Sponsored by Crowley**  
  
Please remember to sign up for your headshots.
- 1815 **Seating for Dinner**  
Maritime Conference Center  
Business casual recommended or dress code as dictated by your academy.  
  
**Presidential Welcome**  
Rear Admiral Francis X. McDonald, LPD  
United States Maritime Service  
President, Massachusetts Maritime Academy  
  
**Keynote Address**  
RADM Ann C. Phillips, US Navy (Ret.)  
Administrator  
Maritime Administration / MARAD  
  
Shuttle Service will be available to the Hampton Inn after dinner.



## FRIDAY, MARCH 1

0700 - 0800 Shuttle Service is available from the Hampton Inn.

0800 - 0815 **Welcome**  
Maritime Conference Center

Commodore Brigid M. Pavilonis  
Provost and Senior VP of Academic Affairs  
Massachusetts Maritime Academy

0815 - 0900 **Breakfast**  
**Sponsored by Wärtsilä**

0900 - 0945 **Vessel-Based Experiences and Careers Near and Far**  
**Sponsored by Chevron**

**Panel 2A: Deep Sea/Offshore**

Moderator: Melissa Turner, Massachusetts Maritime Academy

Captain Lisa Dixon Chaplin, Chevron Shipping  
Karen Higgins, Atlantic Shores Offshore Wind  
Kaitlyn Tradd, Woods Hole Oceanographic Institute  
Captain Andrea Morrison, Offshore Mooring Master

**Panel 2B: Inland/Coastwise**

Moderator: Captain Tiffany Krihwan, Massachusetts Maritime Academy

Kailea Blankenship, USCG STA Cape Cod Canal  
Patricia Greene, Military Sealift Command  
LT Brittany Martineau, United States Coast Guard  
Melany Skippen, Masters, Mates and Pilots





## FRIDAY, MARCH 1

1000 - 1045 **Reach the Beach - Shoreside Experiences and Opportunities**  
**Sponsored by MassCEC**

**Panel 3A: Legal/Regulatory**

Moderator: Jill Taft, Massachusetts Maritime Academy

Michelle Paré Ricca, Loyola University New Orleans, College of Law

Elizabeth Strunk, ESQ, Liskow & Lewis APLC

Vanessa DiDomenico, ESQ, Blank Rome LLP

Lauren Beagan, ESQ, Squall Strategies, LLC

**Panel 3B: Clean Energy**

Moderator: Captain Michael Burns, Massachusetts Maritime Academy

Leah Alessi, Ocean Winds

Jennifer Cullen, Vineyard Offshore

Jeannie Houde, Massachusetts Clean Energy Center

Christina Renaud, AVANGRID Renewables Offshore US

1045 - 1100 **Break**  
**Sponsored by Women Offshore**

1100 - 1145 **SASH / EMBARC**  
**Sponsored by SOCP**

Moderator: Erin Medeiros, Massachusetts Maritime Academy

Sara Kazamias, Massachusetts Maritime Academy

Mariah McGrath, APL Maritime Ltd.

Emily Rose, United States Coast Guard

Captain Todd Kutkiewicz, MARAD

1145 - 1245 **Networking Lunch Expo**  
Sponsored by Clean Harbors, Massport, McAllister Towing, Tote and  
Military Sealift Command

## FRIDAY, MARCH 1

1245 - 1330 **Elizabeth York, Cape Cod Maritime Museum**  
Sailing Against the Tide: Women of Cape Cod and the Islands

1330 - 1345 **Break**  
**Sponsored by Women Offshore**

1345 - 1430 **Port Operations and Government Opportunities**  
**Sponsored by Moran Shipping Agencies**

**Panel 5A: Port Operations and Logistics**

Moderator: Jenn Stone, INSPIRE Environmental

Elizabeth Gondek, Port of New Orleans

Lauren Gleason, Massport

Kelly Meaker, Moran Shipping Agencies

Rebecca Underwood, Clean Harbors

**Panel 5B: Government Opportunities**

Moderator: CDRE Brigid Pavilonis, Massachusetts Maritime Academy

LCDR Cherisa Friedlander, NOAA

Laila Linares, MARAD

Captain Jessica Rozzi-Ochs, USCG Barque EAGLE

1445 - 1530 **Working for the Greater Good**  
**Sponsored by Interlake**

**Panel 6A: Work-Life Balance**

Moderator: Sara Kazamias, Massachusetts Maritime Academy

Captain Todd Kutkiewicz, MARAD

CDR Karen Kutkiewicz, USCG Cutter Venturous (joining via zoom)

Lesley Karentz, STAR Center

Sarah Karentz, Seabulk

**Panel 6B: Back to School - Highlighting Faculty**

Moderator: LT Katherine McClellan, Massachusetts Maritime Academy

LCDR Kerry Chicoine, Massachusetts Maritime Academy

Captain Kathleen Friel, American Maritime Officers Union

Captain Michael Murphy, United States Merchant Marine Academy

Laura Wilcox, Massachusetts Maritime Academy



## FRIDAY, MARCH 1

1600 - 1700     **Mindfulness Activity**  
**Sponsored by Ocean Wind NSB, LLC, MM-SEAS and**  
**Washington State Board of Pilotage Commissioners**

Zumba with LCDR Kerry Chicoine  
Clean Harbors Athletic Center

The perfect way to unwind from the day! Don't forget your work out clothes for this great event!

1530 - 1800     Shuttle Service is available between the Academy and Hampton Inn.

1800     **Networking / Social**  
**Sponsored by Valaris**  
Maritime Conference Center Lobby

1830     **Dinner**  
Business casual recommended or dress code as dictated by your academy.

**Performance by**  
New Bedford Harbor Sea Chantey Chorus

**Keynote Address**  
Vice Admiral Joanna M. Nunan  
Superintendent, United States Merchant Marine Academy

Shuttle Service is available to the Hampton Inn after dinner.

## SATURDAY, MARCH 2

0730 - 0830 Shuttle service is available from the Hampton Inn.  
Luggage storage is available in the MCC Coat Room.

0745 - 0845 **Breakfast, Maritime Conference Center**  
**Sponsored by The Law Office of Farrell, Smith, O'Connell**

0845 - 0900 **Closing Remarks**  
Commodore Brigid M. Pavilonis  
Provost and Senior VP of Academic Affairs  
Massachusetts Maritime Academy

0930 **Visit to Historical New Bedford**  
**Sponsored by Vineyard Offshore**

Casual Dress

Busses leave Massachusetts Maritime Academy at 0930

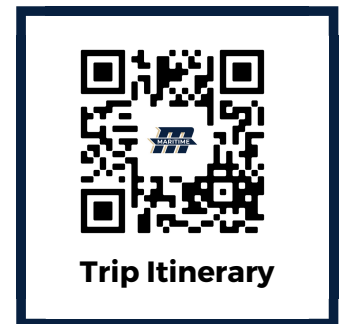
Cuttyhunk Ferry Company- Guided Harbor Tour of Massachusetts Clean  
Energy Center, New Bedford Marine Commerce Terminal

Andrew B. Saunders  
New Bedford Foss Marine Terminal, LLC

Gordon M. Carr  
New Bedford Port Authority

Jeannie Houde  
New Bedford Marine Commerce Terminal

Tim Griffin  
New Bedford Marine Commerce Terminal



1200 **Lunch**  
**Sponsored by Vineyard Offshore and New Bedford Whaling Museum**  
New Bedford Whaling Museum, Harbor View Gallery

**Keynote Address**

Jennifer Downing  
Executive Director, New Bedford Ocean Cluster

Busses return to Massachusetts Maritime Academy after lunch.

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**Maritime Administration**



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# Program At-A-Glance

## PROPOSED SESSION DESCRIPTIONS

### FRIDAY, MARCH 15

0830-1000 CHECK-IN

1000-1045 Opening Keynote

Speaker: Madeleine Wolczko

1100-1215 Military Sealift Command Showcase

Concurrent Session: Marine Sanctuaries & the Future of our Oceans

1230-1400 Lunch – CGIS Tabletop: Evolution of a Reported Incident

1415-1530 The Pasha Group Showcase

Concurrent Session: Team-Building Panel

1545 – 1630 Student Panel: The Next Generation

1645 - 1730 Stay Afloat at Sea or Ashore

1730 Group Photo & Reception

1800 - Dinner

### SATURDAY, MARCH 16

0830-0900 BREAKFAST/CHECK-IN

0900-1000 Opening Panel: Marathon Petroleum

1015-1130 US Coast Guard Showcase

1145-1330 DEI Best Practices

1345-1415 Closing Speaker: Captain Samar Bannister

1415: Macy's Awards & Thank you

*Lynn Korwatch & Vineeta Dhillon*

### California State University Maritime Academy

200 Maritime Academy Drive

Vallejo, CA 94590

707-654-1000