Puget Sound District
Activity Report Dashboard

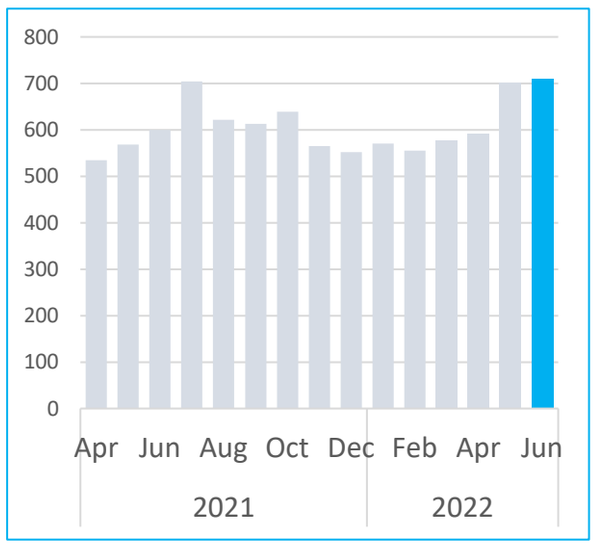
Licensed Pilots Including President	Trainees
53	**8**

includes 1 new pilot licensed in late June

June 2022

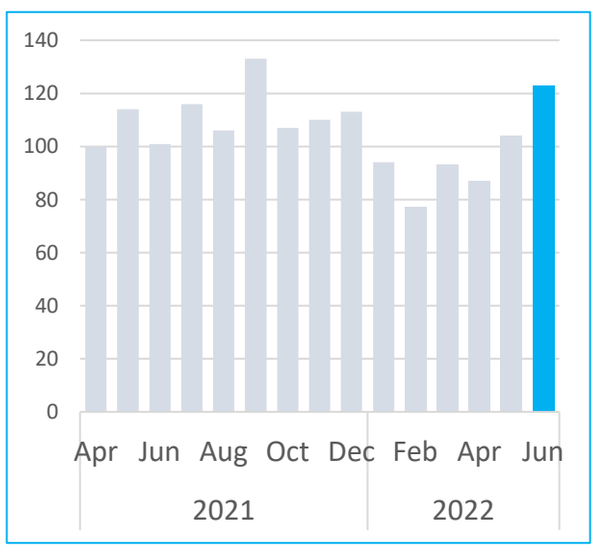
Total Assignments

709



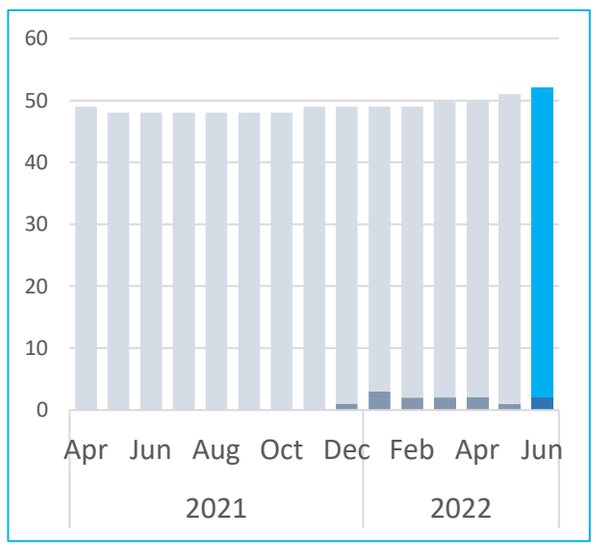
Repositions

123



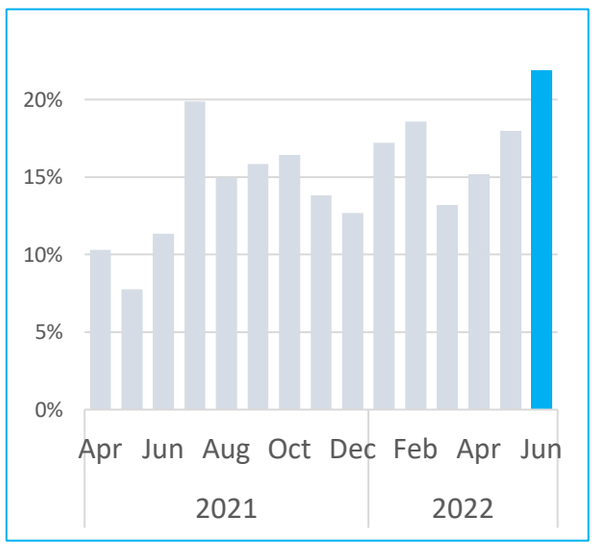
Licensed Pilots not incl Pres: **52**

Licensed Pilots NFFD: **2**



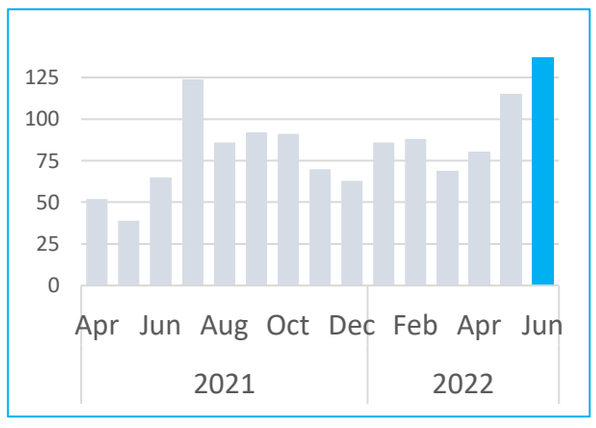
Percent Callbacks

22%



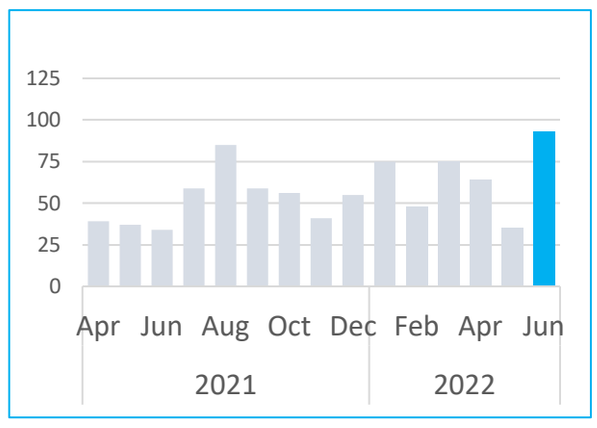
Comp Days Earned (Callbacks)

137



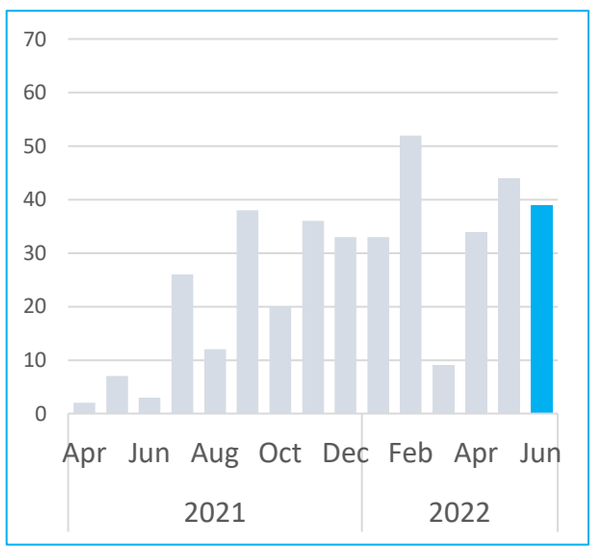
Comp Days Used (Licensed Pilots)

93



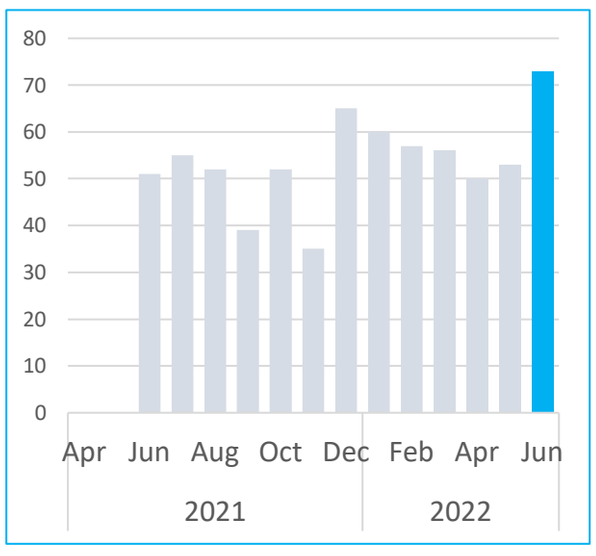
Delays due to Unavailable Rested Pilot

39

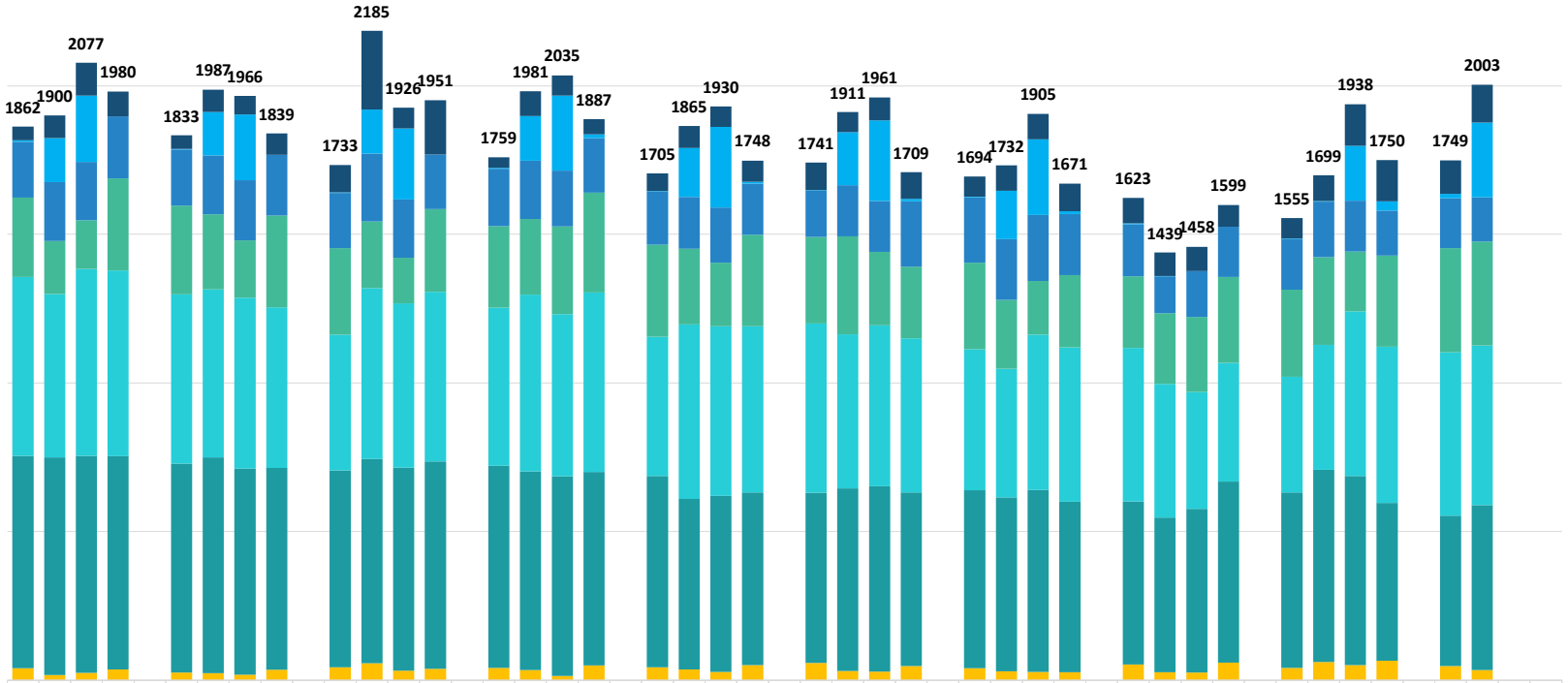


Billable Delays by Customers

73

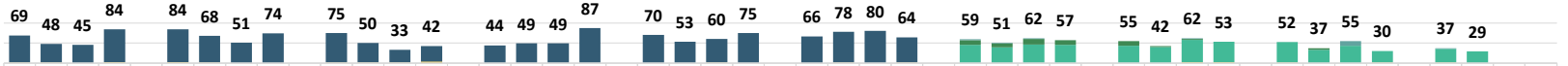


Puget Sound Pilotage District Assignments 2013-2022
quarterly, by vessel type, including cancellations



	2013				2014				2015				2016				2017				2018				2019				2020				2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
6 Other	45	76	110	83	46	76	63	71	92	265	70	182	35	83	68	51	60	74	69	71	92	67	78	90	67	85	85	93	86	79	82	74	69	87	140	139	113	127		
5 Passenger	6	148	223	0	2	146	221	0	2	148	239	0	3	150	253	12	2	165	271	6	3	179	271	8	2	163	255	10	3	1	0	0	2	2	185	31	15	251		
4 Carrier/RoRo	187	199	197	209	189	198	202	205	185	229	196	184	193	196	187	184	178	175	186	173	155	172	171	220	221	205	222	205	175	125	154	169	170	187	171	152	167	150		
3 Bulker	268	178	163	310	298	252	193	309	292	224	153	279	275	255	296	336	310	254	213	307	291	330	247	241	291	231	181	243	241	237	253	289	294	295	201	306	351	349		
2 Tanker	602	550	630	625	570	566	575	540	457	575	553	570	532	595	545	604	468	588	571	560	570	518	542	519	474	433	522	520	517	450	393	399	389	420	554	526	550	537		
1 Container	714	732	730	717	703	726	694	679	662	688	684	698	680	669	672	651	644	573	593	581	573	615	624	584	599	586	613	574	549	521	551	609	590	647	637	531	506	555		
_CANCELS	40	17	24	36	25	23	18	35	43	56	31	38	41	33	14	49	43	36	27	50	57	30	28	47	40	29	27	26	52	26	25	59	41	61	50	65	47	34		
TOTAL	1862	1900	2077	1980	1833	1987	1966	1839	1733	2185	1926	1951	1759	1981	2035	1887	1705	1865	1930	1748	1741	1911	1961	1709	1694	1732	1905	1671	1623	1439	1458	1599	1555	1699	1938	1750	1749	2003		

Grays Harbor Pilotage District Assignments 2013-2022
quarterly, by vessel type when available, including cancellations



	2013				2014				2015				2016				2017				2018				2019				2020				2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
GH BB/Log/Oth																									2	2	2	0	0	0	2	0	0	0	12	0	2	0		
GH Ro-Ro																									12	10	14	12	12	2	2	0	0	4	0	0	0	0		
GH Bulker																									45	39	46	45	43	40	56	51	51	33	43	29	34	29		
GH All Types	68	47	45	82	82	67	51	74	74	49	32	39	44	49	49	87	70	53	59	75	66	77	80	63																
_CANCELS	1	1	0	2	2	1	0	0	1	1	1	3	0	0	0	0	0	0	1	0	0	1	0	1	0	0	0	0	0	0	2	2	1	0	0	1	1	0		
TOTAL	69	48	45	84	84	68	51	74	75	50	33	42	44	49	49	87	70	53	60	75	66	78	80	64	59	51	62	57	55	42	62	53	52	37	55	30	37	29		

DATE	VESSEL	CALL TIME WAS	CALL TIME NOW	TOTAL DELAY	FROM	TO	Reason	Jobs/Repo's/3 & out type jobs (night)	Total	NFFD or Covid	3 and out	Industry delays
6/2/22	KOTA LUKIS	1:00	7:00	6	PS	SEANC-EBE	Pilot shortage, PSP delayed to 0700 when bound for anchor, then agent delayed vessel to 1100 and went straight to dock instead.	19 jobs, 8 repos, 10 night jobs. Prior day (Jun 1) 26 jobs, 1 repo, 12 night jobs	6	6		7:22
6/4/22	KUMASI	1:00	4:00	4	SE18-4	PS	Pilot shortage, avoid 3 out pilot.	21 jobs, 8 repo's, 10 night jobs. Prior day (Jun 3) 25 jobs, 4 repo's, 13 night jobs	7	7		6:53
6/7/22	KMARINE RENOWN	6:00	8:00	3	CPBP-S	PS	Pilot shortage, pilot call time 0800 watch change.	28 jobs, 5 repo's, 16 night jobs. Prior day (jun 6) 26 jobs, 8 repo's, 11 night jobs.	9	7	2	5:58
6/7/22	ATB PRIDE	8:00	9:00	1	PS	CPBP-S	Pilot shortage, and await above vessel's sailing.	28 jobs, 5 repo's, 16 night jobs. Prior day (jun 6) 26 jobs, 8 repo's, 11 night jobs.	9	7	2	5:58
6/7/22	ATB VISION	7:30	9:00	1.5	PS	ANANC-CTR	Pilot shortage, pilot req ends 0849.	28 jobs, 5 repo's, 16 night jobs. Prior day (jun 6) 26 jobs, 8 repo's, 11 night jobs.	9	7	2	5:58
6/10/22	COSMIC ACE	17:00	2:00	8	EVPAC	PS	Pilot shortage, pilot req rest ends 0145 call time 0200.	29 jobs, 7 repo's, 14 night jobs. Prior day (jun 9) 23 jobs, 6 repo's, 12 night jobs	4	4		22:10
6/11/22	MSC TIANPING	8:00	10:00	2	PS	SE5-N	Pilot shortage, await call back pilots req rest prior to repo.	28 jobs, 6 repo's, 16 night jobs. Prior day (jun 10) 29 jobs, 6 repo's, 12 night jobs.	3	3		11:07
6/11/22	MOUNT OWEN	11:15	18:15	7	SECAL	PS	Pilot shortage, pilot rest req ended @ 1652, wait for new tide window.	28 jobs, 6 repo's, 16 night jobs. Prior day (jun 10) 29 jobs, 6 repo's, 12 night jobs.	3	3		11:07
6/13/22	ATB OSG ENDURANCE	2:00	5:00	3	SEBP	VIANC	Pilot shortage, avoid 3 out pilot, bound for anchor	23 jobs, 6 repo's, 10 night jobs. Prior day (Jun 12) 19 jobs, 0 repo's, 10 night jobs	4	3	1	8:07
6/14/22	SILVER LAKE	6:00	13:00	7	PS	SEANC-SCW	Pilot shortage, pilot rest req ended @ 1104 could have been onboard at 1125. Bound for anchor.	22 jobs, 5 repo's, 9 night jobs. Prior day (Jun 13) 23 jobs, 6 repo's, 10 night jobs.	2	2		6:06
6/15/22	ALASKAN EXPLORER	3:30	5:30	2	PS	PAANC	Pilot shortage, avoid 3 out level 5 pilot	21 jobs, 1 repo, 15 night jobs. Prior day (Jun 14) 22 jobs, 5 repo's, 9 night jobs.	2	2		6:23
6/17/22	ALEXANDER BAY	10:00	19:00	9	PS	TA4	Pilot shortage, await rested compday worker round turn.	29 jobs, 6 repo's, 13 night jobs. Prior day (Jun 16) 22 jobs, 6 repo's, 14 night jobs.	3	2	1	10:15
6/17/22	WAN HAI 309	11:00	3:30	16.5	PS	SE18-4	Pilot shortage, pilot rest req ended 0210.	29 jobs, 6 repo's, 13 night jobs. Prior day (Jun 16) 22 jobs, 6 repo's, 14 night jobs.	3	2	1	10:15
6/18/22	MORSBY CHIEF	17:00	0:00	6	TABLA-A	PS	Pilot shortage, await rested comp worker.	31 jobs, 5 repo's, 20 night jobs. Prior day (Jun 17) 22 jobs, 6 repo's, 14 night jobs.	5	2	3	19:23
6/18/22	OVERSEAS BOSTON	4:00	17:15	14.25	CPBP-N	PS	Pilot shortage, await rested pilot.	31 jobs, 5 repo's, 20 night jobs. Prior day (Jun 17) 22 jobs, 6 repo's, 14 night jobs.	5	2	3	19:23
6/18/22	ATB GULF RELIANCE	4:30	17:45	14.25	VIANC	CPBP-N	Pilot shortage, waiting on Overseas Boston & Pilot.	31 jobs, 5 repo's, 20 night jobs. Prior day (Jun 17) 22 jobs, 6 repo's, 14 night jobs.	5	2	3	19:23
6/18/22	NICOPOLIS	14:00	02:00 /20TH	35	ANTES-O/S	PS	Pilot shortage, await rested pilot.	31 jobs, 5 repo's, 20 night jobs. Prior day (Jun 17) 22 jobs, 6 repo's, 14 night jobs.	5	2	3	19:23
6/18/22	CARPATHIA	23:00	12:00	13	PS	SEANC-EBW	Pilot shortage, bound for anchor, then to berth.	31 jobs, 5 repo's, 20 night jobs. Prior day (Jun 17) 22 jobs, 6 repo's, 14 night jobs.	5	2	3	19:23
6/19/22	OCEAN CLIO	2:00	7:00	5	PS	PAANC	Pilot shortage, give Comp day harbor pilot 10 hours rest & pair with other harbor work.	29 jobs, 4 repo's, 10 night jobs. Prior day (Jun 18) 31 jobs, 5 repo's, 20 night jobs.	7	3	4	10:38
6/19/22	GREEN COVE	4:30	6:30	2	PS	TABLA-A	Pilot shortage, comp pilot req rest ended 0551, boarded pilot boat 0613.	29 jobs, 4 repo's, 10 night jobs. Prior day (Jun 18) 31 jobs, 5 repo's, 20 night jobs.	7	3	4	10:38
6/19/22	PARADISE ACE	2:00	5:00	3	TABLA-A	PS	Pilot shortage, Avoid 3 out pilot.	29 jobs, 4 repo's, 10 night jobs. Prior day (Jun 18) 31 jobs, 5 repo's, 20 night jobs.	7	3	4	10:38
6/19/22	WAN HAI 309	1:00	6:00	5	SE18-4	PS	Pilot shortage, avoid 3 out pilot.	29 jobs, 4 repo's, 10 night jobs. Prior day (Jun 18) 31 jobs, 5 repo's, 20 night jobs.	7	3	4	10:38
6/19/22	MAERSK CASABLANCA	14:00	8:00	18	SE18-1	PS	Pilot shortage, avoid 3 out pilot.	29 jobs, 4 repo's, 10 night jobs. Prior day (Jun 18) 31 jobs, 5 repo's, 20 night jobs.	7	3	4	10:38
6/20/22	AQUASURAZO	0:00	3:00	3	VIANC	CPBP-S	Pilot shortage, await comp pilot.	27 jobs, 4 repo's, 8 night jobs. Prior day (Jun 19) 29 jobs, 4 repo's, 10 night jobs.	6	4	2	6:53
6/20/22	SM QINGDAO	0:00	8:00	9	SE30	PS	Pilot shortage, await comp pilot.	27 jobs, 4 repo's, 8 night jobs. Prior day (Jun 19) 29 jobs, 4 repo's, 10 night jobs.	6	4	2	6:53
6/20/22	NAVIOS ORBITER	9:00	13:00	4	TATEM	TATEM	Pilot shortage, await rested pilot.	27 jobs, 4 repo's, 8 night jobs. Prior day (Jun 19) 29 jobs, 4 repo's, 10 night jobs.	6	4	2	6:53

Note: This table only shows dates where there were pilotage delays.
Industry delays (last column) also occurred on other dates not included in this table.

DATE	VESSEL	CALL TIME WAS	CALL TIME NOW	TOTAL DELAY	FROM	TO	Reason		Total	NFFD or Covid	3 and out	Industry delays
6/22/22	GAS STELLA	9:00	14:30	5.5	PS	FEINT	Pilot shortage, await rested pilot, 1414	25 jobs, 2 repo's, 11 night jobs. Prior day (Jun 21) 26 jobs, 5 repo's, 14 night jobs.	4	4		7:53
6/22/22	KEN SPIRIT	4:30	5:30	1	PS	SEANC-EBW	Pilot shortage, avoid night work.	25 jobs, 2 repo's, 11 night jobs. Prior day (Jun 21) 26 jobs, 5 repo's, 14 night jobs.	4	4		7:53
6/22/22	MOUNT SEYMOUR	0:30	5:00	4.5	SESTR/ANC	PS	Pilot shortage, avoid 3 out pilot.	25 jobs, 2 repo's, 11 night jobs. Prior day (Jun 21) 26 jobs, 5 repo's, 14 night jobs.	4	4		7:53
6/22/22	YM TRUTH	9:00	12:00	3	PS	TAANC	Pilot shortage, combine interport w/harbor shift.	25 jobs, 2 repo's, 11 night jobs. Prior day (Jun 21) 26 jobs, 5 repo's, 14 night jobs.	4	4		7:53
6/23/22	MATE	6:00	10:00	4	PS	PAANC	Pilot shortage, combine interport w/harbor shift.	26 jobs, 3 repo's, 10 night jobs. Prior day (Jun 22) 25 jobs, 2 repo's, 11 night jobs.	8	4	4	12:27
6/23/22	ATB COMMITMENT	3:00	5:00	2	PS	CPBP-N	Pilot shortage, avoid night work.	26 jobs, 3 repo's, 10 night jobs. Prior day (Jun 22) 25 jobs, 2 repo's, 11 night jobs.	8	4	4	12:27
6/24/22	SEATTLE EXPRESS	1:00	5:00	4	SE18-1	PS	Pilot shortage, avoid night work.	23 jobs, 1 repo, 5 night jobs. Prior day (Jun 23) 26 jobs, 3 repo's, 10 night jobs.	4	4		7:17
6/26/22	WESTWOOD OLYMPIA	0:00	5:00	5	SE30-N	PS	Pilot shortage, await rested junior pilot-saving senior pilot for cruise ship.	24 jobs, 5 repo's, 8 night jobs. Prior day (Jun 25) 22 jobs, 2 repo's, 8 night jobs	6	5	1	7:17
6/27/22	ATB DUBLIN SEA	3:00	5:00	2	CPBP-N	PS	Pilot shortage, prevent senior pilot from 3/out, needed inbound.	22 jobs, 0 repo's, 11 night jobs. Prior day (Jun 26) 24 jobs, 5 repo's, 8 night jobs.	6	5	1	10:56
6/28/22	ZIM IBERIA	0:00	5:00	5	TA4	PS	Pilot shortage, avoid night work, save 3/out.	26 jobs, 1 repo, 14 night jobs. Prior day (June 27) 22 jobs, 0 repo's, 11 night jobs..	6	5	1	5:41
6/28/22	ATB VISION	6:00	6:20	0.33	SESTR	VIANC	Pilot shortage, await rested pilot.	26 jobs, 1 repo, 14 night jobs. Prior day (June 27) 22 jobs, 0 repo's, 11 night jobs..	6	5	1	5:41
6/29/22	MAERSK PEARY	5:30	8:00	0.5	VIANC	PS	Pilot shortage, allow for junior pilot, save senior pilot for senior vessel.	19 jobs, 3 repo's, 10 night jobs. Prior day (June 28) 16 jobs, 1 repo, 14 night jobs.	9	4	5	7:48
6/30/22	TOKYO TOWER	5:00	8:00	4	SE18-1	PS	Pilot shortage, await rested pilot off 3/out.	17 jobs, 4 repo's, 9 night jobs. Prior day 19 jobs, 3 repo's, 10 night jobs.	9	4	5	4:25
				242.33								

UTC
Washington Utilities and Transportation Commission

Agency Overview, Process and Communication Protocols

April 18, 2019

Board of Pilotage Commissioners

UTC Overview

- Three commissioners, appointed by Governor and confirmed by state Senate for 6-year terms.
- Law requires political balance.

David Danner
Chairman

Ann Rendahl
Commissioner

Jay Balasbas
Commissioner

UTC Overview

- The commission regulates the rates, services, safety, and consumer protection and practices of privately-owned utilities and transportation companies (electric, telecommunications, natural gas, water, solid waste collection companies, pipeline safety, railroads and railroad crossings, commercial ferries, buses, airporters and household goods carriers).

- Approximately 160 full-time employees, including accountants, auditors, economists, engineers, attorneys, consumer complaint specialists, inspectors, investigators, policy specialists, environmental specialists and other administrative staff.

- The UTC is organized into 7 divisions (Administrative Law, Administrative Services, Regulatory Services, Transportation Safety, Pipeline Safety, Communications and Consumer Protection, and Legislation and Policy)

UTC Overview

- Regulate rates and services of investor-owned or private utility and transportation companies.
- Public safety role over hazardous pipelines, passenger transportation, and rail safety.
- Ensure utility and transportation services are safe, available, and reliable.
- Establish rates that are “fair, just, reasonable, and sufficient.”
- Serve as watchdog for enforcing consumer protection and safety rules for regulated companies.

RCW 80.01.030(3); RCW 80.28.010

UTC Process

Open Meetings

- Normally held the second and last Thursday of each month beginning at 9:30 a.m. to review regulated company filings.
- Commissioners independently may discuss substance of Open Meeting agenda items with agency staff, the regulated company or other parties, but cannot talk with the other two commissioners until the item is addressed at the Open Meeting.

UTC Process

Adjudications

- The commission acts as a quasi-judicial court of law to hear and decide cases.
- After a filing is suspended by the Commission, the Administrative Law Division issues a notice of prehearing conference, schedules a date for all parties and interested persons who wish to formally intervene to make appearances, and establishes a procedural schedule for the case, including a hearing date.
- UTC Regulatory Staff acts as a party during adjudications and takes a position as an advocate in the proceeding.

Adjudications and Commissioner Communications

- Commissioners must make decisions based on an evidentiary record gathered in a formal hearing. To ensure a decision is based on the record, and not on discussions with a party, the law requires "No improper ex parte contact.”
- Commissioners cannot discuss adjudicative proceedings, directly or indirectly, with any party to the case outside of the hearing room unless it is in a session of which all other parties have notice. Commissioners may talk with each other about a pending adjudication, and may consult with advisory policy staff independently or with other commissioners.
- UTC regulatory staff and regulated companies are almost always parties to formal cases, so there is care to ensure Commissioner discussions with staff do not stray into formal case topics.
- Commissioners can discuss the case with "advisory teams.” The "no improper ex parte contact" requirement extends to members of these advisory teams as well. This means the policy advisors to a formal case cannot discuss the merits of a suspended case with either company representatives or UTC regulatory staff.

Summary of Commissioner Communication Protocols: Who can the Commissioners Talk to and in what Contexts?

Decision type	Can the Commissioners talk with each other?	Members of the public about the merits?	Regulated company that is a party?	UTC regulatory staff?	Attorney General representing regulatory staff	UTC advisory staff (administrative law judges and policy staff)
Prior to Open Meetings	no	yes	(Generally) yes	yes	yes	yes
Rulemakings	yes	yes	yes	yes	yes	yes
Formal hearings	yes	no	no	no	no	yes

Role of the BPC in Marine Pilotage Rate-Setting

- Provide assistance to the UTC upon request in its performance of pilotage tariff-setting functions – RCW 88.16.035(1)(e).
- The BPC acts as part of the UTC Commissioners' "advisory team" in an adjudication subjecting it to the same "ex parte" rules as the Commissioners.
- Some members of the BPC include individuals who are considered a party in the marine pilotage tariff adjudication and are therefore not eligible to participate in the Commissioners' deliberations.

State of Washington
Pilotage Commission
July 19, 2022

Grays Harbor District Report

There were 5 arrivals in June for a total of 11 jobs. Year to date through June there have been 23 arrivals for a total of 66 jobs. There are 9 vessels scheduled for July: 5 dry bulk and 4 liquid bulk.

Pilot Trainees

Pilot Trainee Captain Ryan Leo has completed 65 trips in his training program. He has completed all of the required trips in the first section (initial familiarization/observation) and all of the required trips in the second section (initial route) and his last trip to anchor in the Observation Phase. He is now in the Training Phase where he has been piloting vessels through the main channel as well docking and undocking at Terminals 1 & 2 and will begin training on jobs from anchor.

Captain Leo has applied for federal pilotage and his application has been sent from the Regional Exam Center Portland to the National Marine Center, where it has passed safety and suitable vetting and is awaiting professional qualification review.

Pilot Trainee Captain Colby Grobschmit had his training program approved by the Washington State Board of Commissioners. The Trainee Evaluation Committee met with Captain Grobschmit in Aberdeen on July 6, 2022 where he received an orientation on the training program. Captain Grobschmit has already completed his orientation rides on the pilot boat and the tugs.

Captain Grobschmit has also applied for his Federal Pilotage License.

PUGET SOUND PILOTAGE DISTRICT ACTIVITY REPORT

Jun-2022

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:	709			Cancellations:	6					
Total ship moves:	703	Cont'r:	175	Tanker:	206	Genl/Bulk:	135	Other:	187	
Assignments delayed due to unavailable rested pilot:	39					Total delay time:	242.33			
Billable delays by customers:	73					Total delay time:	183			
Order time changes by customers:	201									
2 pilot jobs:	38	Reason:	PSP GUIDELINES FOR RESTRICTED WATERWAYS							
Day of week & date of highest number of assignments	Saturday, 6/18							31		
Day of week & date of lowest number of assignments	Wednesday, 6/8							14		
Total number of pilot repositions:	123	Upgrade trips	17	YTD	72					
3 consecutive night assignments:	47	YTD	244							

Callback Days/Comp Days

	Starting Total	Call Backs (+)	Used (-)	Burned (-)	Ending Total
Licensed	2598	137	93		2642
Unlicensed	245			30	215
Total	2843	137	93	30	2857

On watch assignments	**554**	**Call back assignments**	**155**	**CBJ ratio**	**21.86%**

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
21-Jun	21-Jun	Seattle	PMI	ULCV	BOU*, HED, ROU

*on watch	off watch	NFFD
1	1	1

B. Board, Committee & Key Government Meetings (BPC, PSP, USCG, USACE, Port & similar)

Start Dt	End Dt	City	Group	Meeting Description	Pilot Attendees
1-Jun	1-Jun	Seattle	USCG	Ladder Safety	ANA
1-Jun	1-Jun	Anacortes	PSP	Outreach	MCG
1-Jun	1-Jun	Virtual	PSP	Port of Anacortes, LD	LOB, MCG
1-Jun	1-Jun	Virtual	BPC	TEC	ANT**, BEN
2-Jun	2-Jun	Seattle	PSP	Rate Committee	COL*, GAL, GRK**, KLA, MOT*
7-Jun	7-Jun	Port Angeles	PSP	Pilot Boat, JDF	SEM*

8-Jun	8-Jun	Virtual	PSP	DOE, Escort	BOU
9-Jun	10-Jun	Seattle	PSP	President	KLA*
9-Jun	9-Jun	Virtual	PSP	Outreach	BOZ
9-Jun	9-Jun	Virtual	BPC	Vessel Exemption Committee	ANT**, MCG*
9-Jun	9-Jun	Virtual	PSP	Quiet Sound	KAL*
11-Jun	18-Jun	Mexico	PSP	IMPA	BEN*(off 6/11-6/13), ANA*
13-Jun	13-Jun	Virtual	PSP	IBU	MCN, SES
16-Jun	16-Jun	Virtual	PSP	Rate Committee	COL, GAL*
16-Jun	16-Jun	Virtual	PSP	Consult	BOZ, VON**
20-Jun	20-Jun	Virtual	BPC	BPC PREP	BEN*
21-Jun	21-Jun	Virtual	BPC	TEC	ANT*, BEN*
21-Jun	21-Jun	Virtual	BPC	BPC	ANT*, BEN*
23-Jun	23-Jun	Virtual	PSP	UTC	COL*, GAL*, GRK, KLA*
24-Jun	24-Jun	Virtual	PSP	Rate Committee	COL*, GAL, GRK, KLA
26-Jun	26-Jun	Virtual	PSP	Rate Committee	COL**, GAL, GRK, KLA

* on watch	off watch	** paired to	NFFD
27	19	8	3

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

Start Dt	End Dt	REASON	PILOT
1-Jun	30-Jun	NFFD	HAM
1-Jun	8-Jun	NFFD	BOU
15-Jun	30-Jun	NFFD	HED
31-May	9-Jun	COVID	MAN
30-May	8-Jun	COVID	KEA
1-Jun	10-Jun	COVID	KRI
4-Jun	13-Jun	COVID	ROU
19-Jun	29-Jun	COVID	BEN
20-Jun	30-Jun	COVID	ANA
25-Jun	5-Jul	COVID	SEA
30-Jun	9-Jul	COVID	LOB

Presentations

If requesting to make a presentation, provide a brief explanation of the subject, the requested amount of

Presentations may be deferred if prior arrangements have not been made.

The Board may also defer taking action on issues being presented with less than 1 week notice prior to a schedule Board Meeting to allow adequate time for the Commissioners and the public to review and prepare for discussion.

WA State Board of Pilotage Commissioners

Industry Update: June 21, 2022 BPC Meeting

Vessel Arrivals – Cargo Down, Tank & Cruise Up

Year to Date – Total the Same as Last Year Low Numbers After Separating Out Cruise

- Containers down 60
- Bulkers up 6
- General up 19
- RoRo up 2
- Car Carriers down 25
- Tankers up 42
- ATB's up 10
- Cruise up 124

Container arrivals down 13% and well below pre-COVID years. Car carrier arrivals are down 23% YTD while Tankers/ATB's are up 21% YTD and Cruise is up and running. Inflation up, demand for goods is down which should ease cargo congestion and vessel queues.

FMC Fact Finding Investigation Finds 'Vigorous' Competition in Container Shipping

Though there have been charges of illegal activity or concerns of market concentration driving increased ocean freight costs, the Fact Finding Officer's assessment is that our transpacific market is not concentrated and that the increased rates in that market are a result of an extreme spike of consumer demand in the United States that overwhelmed the supply of ship capacity. Similarly, the U.S. Atlantic market for ocean shipping is barely concentrated, and increased rates in that market are also a result of overwhelming U.S. demand. Furthermore, a reassuring data trend indicates that the individual ocean carriers within each alliance continue to compete on pricing and marketing independently and vigorously. Individual ocean carriers within alliances continue to add and withdraw vessels from trades both inside and outside the alliances in which they participate and, particularly in the transpacific, new entrants have been entering the trade. The transpacific is a highly contestable market.

Pilot Service Supply, Demand & Delays – BPC Letter Sent to Industry

- ✓ Again, pilot delays significantly increased from 2.98/month in the 18 months prior to last July.
- ✓ Implementation of efficiencies should decrease pilot delays but…?
- ✓ Cruise season peaks are not new.
- ✓ The ratio of licensed pilots to average daily assignment workload remains more than two to one even during this peak season… why so many delays?
- ✓ **We recommend BPC require tracking daily number of pilots on duty AND available each day compared to the assignment workload each day to shed light and identify solutions**

PMA ILWU Contract Negotiations Continue…

- ✓ The two sides released a joint statement saying they aren't preparing for a strike or a lockout.

Container Vessels Queuing Up: at Anchor, Drifting or Slow Steaming

- ✓ Queueing changes implemented in September of 2021 continue to be successful at minimizing the need to anchor or drift offshore.
- ✓ LA/LB and Oakland numbers are significantly down from their peak

Railroad bottleneck at nation's busiest West Coast ports reaches inflection point

By Lori Ann LaRocco, CNBC

HTTPS://WWW.CNBC.COM/2022/07/08/RAILROAD-BOTTLENECK-AT-WEST-COAST-PORTS-REACHES-INFLECTION-POINT.HTML

KEY POINTS

- 60% of all long-dwell containers at the Port of Los Angeles are rail-bound.
- Container wait for rail is a little over 8 days for the ports of Los Angeles and Long Beach.
- East Coast ports including the Port of Norfolk, Port of Savannah, and the Port of New York and New Jersey are seeing more shipping activity as a result.

Rail congestion from Berkshire Hathaway subsidiary BNSF and Union Pacific, the railroads servicing the West Coast ports, is getting worse and slowing down container processing at the nation's largest port complex. "60% of our long dwelling containers are scheduled to go on the rail," said Gene Seroka, executive director of the Port of Los Angeles. "Our land capacity is at 90% ."

East Coast ports are taking more share

The congestion at the ports and the threat of labor slowdowns or strikes by longshoremen have led to a parade of trade moving away from the West Coast to the East Coast.

Shipping lines on starting grid in new 'race' to apply box tracking and telemetry

By Charlie Barlett, The Load Star

https://theloadstar.com/shipping-lines-on-starting-grid-in-new-race-to-apply-box-tracking-and-telemetry/

Industry experts believe cash-rich carriers, now seeing contracting demand, are set to fight over diminishing cargo volumes as the pandemic eases. They will resort to finding unique selling points, which could see them turn to track and trace solutions. Recently, Hapag-Lloyd began to fit tracking and telemetry to its containers, stealing a march on its competitors and starting "a train that will not stop" among carriers, according to some industry figures.

In particular, tracker manufacturers Nexxiot and Orbcomm expect tracking to be pivotal for carriers to retain customers. "There will be a race between shipping lines, about who will be next to follow Hapag-Lloyd," said Stefan Kalmund, CEO of Nexxiot, who called the movement a "megatrend".

Deteriorating container flow shows disconnect with signs of 'normalization'

Peter Tirschwell | Jul 07, 2022 12:05PM EDTBNSF

https://www.joc.com/international-logistics/deteriorating-container-flow-shows-disconnect-signs-%E2%80%98normalization%E2%80%99_20220707.html

With container flow deteriorating in North America and Europe, a return to a normal circulation of ships, containers, and chassis increasingly resembles a mirage in the desert: It may be visible, but it's an illusion and ever-receding.

It's not simply a matter of importers holding too much inventory, however. It's inventory that is mismatched to current customer demand and thus not easily moved, partly as a result of earlier supply chain bottlenecks that caused inventory to miss the holiday season, or importers ordering far in advance of need to mitigate the risk of lost sales from supply chain delays. This comes on top of significantly elevated volumes; containerized imports from Asia were up more than 30 percent in the first five months of this year compared with the same period in 2019, according to PIERS, a sister product of JOC.com within S&P Global.

That comes on top of other problems that have been building for months, including US intermodal rail service. BNSF Railway summed up the issue in a recent filing with the US Surface Transportation Board, in which it wrote, "We continue to see a significant number of trains queue for intermodal service in our LPC facility [outside Chicago] because shippers are not pulling containers fast enough to allow BNSF to ground new containers."

"The ports are becoming more congested, and both the Canadian and US railroads are backlogged, creating congestion at the ports," Jon Monroe, a consultant to non-vessel-operating common carriers, said. "Last year at this time, we were only concerned with the BNSF and UP routings to the Midwest. Now we have the Canadian rail providers backed up. We just cannot win."

PMSA

West Coast Trade Report

June 2022

May's Incomplete TEU Tallies

Not all ports revealed their May container statistics before this newsletter went to print on June 22. As longtime readers know, this newsletter does not rely on predictive models but instead prefers to await the TEU counts compiled by the ports we survey each month. Although this means our TEU tallies for the latest month are not complete, it at least allows us to avoid the inconsistencies that dog some forecasts, especially at a time when pundits are divided on whether containerized imports will be up or down as we move through the summer and into the fall.

For the sake of benchmarking expectations for May, we note that an outlook dated June 8 from the National Retail Federation's Global Port Tracker (GPT) projects import traffic in May through the thirteen U.S. ports it monitors will amount to 2.31 million TEUs. That, it says, would represent a 0.9% decline from the 2.33 million TEUs that arrived in May 2021.

However, a separate accounting we received on June 15 from the McCown Container Volume Observer anticipates that the nation's ten largest ports will handle 2,287,801 inbound TEUs during May, which reportedly represents a 2.9% gain over last May. Normally, the ten largest ports handle about 95% of the container traffic captured by GPT. So, it's statistically unlikely the numbers from the three additional ports GPT monitors would account for the conflicting outlooks.

Photo courtesy of Port of Long Beach

As Mark Twain once wrote: "You pays your money and you takes your choice."

So, here's what we definitely know so far about container traffic at North America's ports during the year's fifth month.

The first major port to post its May container figures was the **Port of Long Beach**. Inbound loads (436,977 TEUs) were the highest this year and were up 9.0% from April. However, they still numbered 7,759 fewer TEUs than in May 2021, a dip of 1.7%. Outbound loads (118,234 TEUs) were down by 12.6% from a year earlier. Even while recording its highest-ever volume of outbound empties (325,105 TEUs), the Southern California port nonetheless handled 1.8% fewer TEUs this May than it had a year earlier. Still, it was the port's second busiest month in its history.

Next door at the **Port of Los Angeles**, inbound loads totaled 499,960 TEUs, the most inbound loads the port has handled this year. That was a 9.5% bump over April, but a 6.7% drop from May of 2021, the busiest month in the port's history. Outbound loads (125,656 TEUs) were up 14.4% from a year earlier, while total container flows through the port reached 967,900 loads and empties. Year-to-date, the nation's largest port has handled 4,537,291 TEUs, down slightly (-0.3%) from the same period last year.

Together, the two San Pedro Bay ports handled 936,937 inbound loads in May, a 9.3% increase over April but a 4.4% decline from a year earlier. Outbound loads in May at the two ports totaled 243,890 TEUs, up 10% from the previous month but down a very slender 0.5% from May 2021. Empty outbounds totaled 665,670 TEUs, 51,310 more TEUs than in April but 9,759 fewer TEUs than in May 2021.

At the **Port of Oakland**, inbound loads totaled 98,789 TEUs, up 17.2% over April and 6.7% year-over-year.

Pacific Merchant Shipping Association
70 Washington Street, Suite 305, Oakland, CA 94607
510-987-5000 info@pmsaship.com

SUBSCRIBE TO OUR DISTRIBUTION LIST

pmsaship.com

May's Incomplete TEU Tallies Continued

Outbound loads (75,067 TEUs) were also up by 14.0% over April but only marginally (+341 TEUs) over the previous May. Owing to a 12.3% fall-off in outbound empties, the Northern California port actually handled fewer total TEUs (224,298) than it had a year earlier when 226,406 TEUs crossed its docks.

May was not the best of months at the ports of the Pacific Northwest. On the U.S. side of the border, import loads at the Northwest Seaport Alliance **Ports of Seattle and Tacoma** fell 10.1% to 120,624 TEUs from 134,246 TEUs the previous May. Export loads dropped by 28.3% to 45,543 TEUs from 63,558 TEUs a year earlier. Export loads in May were the fewest of any May in the joint history of the two Washington State ports. All international container moves through the NWSA ports in May totaled 253,882 TEUs, down 6.2% from the previous May. YTD, all container traffic (including domestic shipments involving Alaska and Hawaii) totaled 1,497,608 TEUs, a decline of 2.5% from the first five months of 2021.

Across the border, the **Port of Vancouver** struggled to recapture pre-COVID (and pre-flood) volumes of container trade. Inbound loads in May (168,057 TEUs) were down by 11.3% from a year earlier, while outbound loads (61,801 TEUs) plunged 33.2% from 92,611 TEUs in May 2021. Total box trade through the port in May was 320,182 TEUs, down 13.9% from a year earlier. YTD, Vancouver has handled 1,483,846 TEUs, a year-over-year decline of 9.7%.

Further up the Pacific Coast, the **Port of Prince Rupert** saw its tribulations continue in May, with inbound loads down 20.5% year-over-year to 45,053 TEUs. Outbound loads in May totaled 10,918 TEUs, the fewest for any May in the past decade. Total container traffic through the port amounted to 86,559 TEUs, down 16.7% from a year earlier.

Inbound loads at the **Port of Houston** in May (158,798 TEUs) were down 2.6% from April but up 19.5% from a year earlier. Outbound loads (106,358 TEUs) were also down from the previous month but rose 11.4% from May of last year. Overall container traffic at the Texas port totaled 335,366 TEUs, a 16.4% year-over-year bump. Through May, Houston's 1,573,242 total TEUs make it the nation's 5th busiest container port.

Along the Eastern Seaboard, the **Port of Savannah** recorded 253,508 loaded inbound TEUs, a 2.6% gain over April and a 7.6% increase over the previous May. Outbound loads totaled 122,287 TEUs, a decline of 11.3% from a year earlier. Total container traffic through the Georgia port amounted to 519,388 TEUs, 8.5% over the previous May. YTD, the port has handled 2,396,986 TEUs.

Up the coast, the **Port of Charleston** handled 126,320 inbound loaded TEUs in May, 10.2% fewer than arrived in April but up nonetheless by 18.0% year-over-year. Outbound loads, meanwhile, totaled 53,312 TEUs, the fewest in any month since January 2016. Total container traffic amounted to 255,104 TEUs, the lowest volume since February. YTD, the South Carolina port has handled 1,240,472 loaded and empty TEUs, 12.4% more than last year at this point.

At the **Port of Virginia**, inbound loads in May totaled 166,907 TEUs. That represented an all-time record high for any month in the port's history. Outbound loads (97,665 TEUs), on the other hand, were down 2.1% from a year earlier. Total container moves through the port in May amounted to 340,119 TEUs, the most in the port's history.

We Make Cargo Move

The Port OF Hueneme

Exhibit 1 April 2022 - Inbound Loaded TEUs at Selected Ports

	Apr 2022	Apr 2021	% Change	Apr 2020	% Change	Apr 2022 YTD	Apr 2021 YTD	% Change	Apr 2020 YTD	% Change
Los Angeles	456,208	490,127	-6.9%	370,111	23.3%	1,803,146	1,830,735	-1.5%	1,275,122	41.4%
Long Beach	400,803	367,151	9.2%	253,540	58.1%	1,607,752	1,512,234	6.3%	1,046,663	53.6%
San Pedro Bay Total	**857,011**	**857,278**	-0.03%	**623,651**	37.4%	**3,410,898**	**3,342,969**	2.0%	**2,321,785**	46.9%
Oakland	84,303	101,886	-17.3%	80,003	5.4%	347,720	357,024	-2.6%	298,475	16.5%
NWSA	99,291	121,294	-18.1%	96,992	2.4%	464,378	481,956	-3.6%	375,565	23.6%
Hueneme	11,790	8,975	31.4%	4,002	194.6%	46,865	28,556	64.1%	17,982	160.6%
San Diego	6,046	6,116	-1.1%	5,765	4.9%	26,202	26,062	0.5%	25,271	3.7%
USWC Total	**1,058,441**	**1,095,549**	-3.4%	**810,413**	30.6%	**4,296,063**	**4,236,567**	1.4%	**3,039,078**	41.4%
Boston	4,767	9,865	-51.7%	11,546	-58.7%	18,443	37,335	-50.6%	46,896	-60.7%
NYNJ	415,216	359,265	15.6%	284,074	46.2%	1,641,946	1,457,992	12.6%	1,178,673	39.3%
Maryland	38,311	44,501	-13.9%	45,258	-15.3%	159,893	165,580	-3.4%	167,918	-4.8%
Virginia	142,639	137,954	3.4%	100,310	42.2%	562,644	509,071	10.5%	405,882	38.6%
South Carolina	140,730	105,054	34.0%	82,899	69.8%	509,696	396,298	28.6%	337,761	50.9%
Georgia	247,177	236,479	4.5%	166,679	48.3%	929,526	909,196	2.2%	672,482	38.2%
Jaxport	28,906	24,214	19.4%	23,461	23.2%	102,631	109,958	-6.7%	98,916	3.8%
Port Everglades	36,571	28,974	26.2%	23,164	57.9%	134,418	117,068	14.8%	107,226	25.4%
Miami	43,634	47,644	-8.4%	28,943	50.8%	175,837	187,736	-6.3%	135,611	29.7%
USEC Total	**1,097,951**	**993,950**	10.5%	**766,334**	43.3%	**4,235,034**	**3,890,234**	8.9%	**3,151,365**	34.4%
New Orleans	12,686	11,138	13.9%	9,926	27.8%	38,364	41,421	-7.4%	45,531	-15.7%
Houston	162,969	128,834	26.5%	100,034	62.9%	600,052	477,105	25.8%	383,306	56.5%
USGC	**175,655**	**139,972**	25.5%	**109,960**	59.7%	**638,416**	**518,526**	23.1%	**428,837**	48.9%
Vancouver	179,599	171,689	4.6%	148,718	20.8%	611,184	648,672	-5.8%	517,866	18.0%
Prince Rupert	53,627	28,051	91.2%	52,730	1.7%	181,693	165,356	9.9%	187,451	-3.0%
British Columbia Total	**233,226**	**199,740**	14.0%	**201,448**	13.0%	**792,877**	**814,028**	-3.3%	**705,317**	11.6%
US/BC Total	2,565,273	2,429,211	5.6%	1,888,155	35.9%	9,962,390	9,459,355	5.3%	7,324,597	36.0%
US Total	2,332,047	2,229,471	4.6%	1,686,707	38.3%	9,169,513	8,645,327	6.1%	6,619,280	38.5%
USWC/BC Total	1,291,667	1,295,289	-0.3%	1,011,861	27.7%	5,088,940	5,050,595	0.8%	3,744,395	35.9%

Source Individual Ports

Exhibit 2 April 2022 - Outbound Loaded TEUs at Selected Ports

	Apr 2022	Apr 2021	% Change	Apr 2020	% Change	Apr 2022 YTD	Apr 2021 YTD	% Change	Apr 2020 YTD	% Change
Los Angeles	99,878	114,449	-12.7%	130,321	-23.4%	407,285	457,883	-11.1%	534,142	-23.7%
Long Beach	121,876	124,069	-1.8%	102,502	18.9%	477,056	499,339	-4.5%	482,127	-1.1%
San Pedro Bay Totals	**221,754**	**238,518**	-7.0%	**232,823**	-4.8%	**884,341**	**957,222**	-7.6%	**1,016,269**	-13.0%
Oakland	65,834	80,290	-18.0%	82,164	-19.9%	259,750	313,131	-17.0%	322,158	-19.4%
NWSA	46,600	59,729	-22.0%	66,955	-30.4%	184,413	251,317	-26.6%	281,313	-34.4%
Hueneme	2,946	2,243	31.3%	1,000	194.6%	13,522	7,164	88.7%	4,494	200.9%
San Diego	798	308	159.1%	248	221.8%	4,133	1,706	142.3%	1,062	289.2%
USWC Totals	**337,932**	**381,088**	-11.7%	**383,190**	-11.8%	**1,346,159**	**1,530,540**	-12.0%	**1,625,296**	-17.2%
Boston	1,854	6,669	-72.2%	5,354	-65.4%	10,119	26,040	-61.1%	24,599	-58.9%
NYNJ	112,235	121,671	-7.8%	97,312	15.3%	435,928	451,806	-3.5%	466,381	-6.5%
Maryland	18,892	21,515	-12.2%	15,523	21.7%	80,328	82,719	-2.9%	77,383	3.8%
Virginia	99,589	95,618	4.2%	71,158	40.0%	353,563	362,618	-2.5%	322,081	9.8%
South Carolina	55,571	73,333	-24.2%	56,611	-1.8%	233,599	287,758	-18.8%	272,428	-14.3%
Georgia	125,330	128,205	-2.2%	120,852	3.7%	429,278	487,899	-12.0%	505,539	-15.1%
Jaxport	49,433	51,129	-3.3%	31,524	56.8%	183,305	190,585	-3.8%	152,083	20.5%
Port Everglades	35,331	33,506	5.4%	20,119	75.6%	131,953	126,246	4.5%	121,432	8.7%
Miami	27,167	30,462	-10.8%	24,964	8.8%	106,880	116,172	-8.0%	126,034	84.8%
USEC Totals	**525,402**	**562,108**	-6.5%	**443,417**	18.5%	**1,964,953**	**2,131,843**	-7.8%	**2,067,960**	-5.0%
New Orleans	23,521	23,246	1.2%	20,076	17.2%	78,638	90,273	-12.9%	98,650	-20.3%
Houston	114,860	91,766	25.2%	91,808	25.1%	392,420	378,045	3.8%	436,416	-10.1%
USGC Totals	**138,381**	**115,012**	20.3%	**111,884**	23.7%	**471,058**	**468,318**	0.6%	**535,066**	-12.0%
Vancouver	62,110	85,768	-27.6%	91,942	-32.4%	228,719	329,855	-30.7%	347,784	-34.2%
Prince Rupert	12,404	10,000	24.0%	22,526	55.1%	50,697	56,397	-10.1%	67,161	-24.5%
British Columbia Totals	**74,514**	**95,768**	-22.2%	**114,468**	-34.9%	**279,416**	**386,252**	-27.7%	**414,945**	-32.7%
US/BC Total	1,076,229	1,153,976	-6.7%	1,052,959	2.2%	4,061,586	4,516,953	-10.1%	4,643,267	-12.5%
US Total	1,001,715	1,058,208	-5.3%	938,491	6.7%	3,782,170	4,130,701	-8.4%	4,228,322	-10.6%
USWC/BC Total	412,446	476,856	-13.5%	497,658	-17.1%	1,625,575	1,916,792	-15.2%	2,040,241	-20.3%

Source Individual Ports

For the Record: April TEU Numbers

Exhibit 1 displays the complete inbound loaded TEU traffic numbers for April 2022 at the North American ports we regularly survey. Its most notable revelation is that U.S. East Coast (USEC) ports handled 39,510 more inbound loads than did U.S. West Coast (USWC) ports. Given that there was a 3.4% year-over-year fall-off in inbound loads through USWC ports while USEC ports enjoyed a 10.5% increase, that's hardly a shock. Also notable is that the U.S. Gulf Coast ports we track posted a 25.5% gain over last April. Some of our favorite maritime industry pundits evidently see this as further evidence that importers are shying away from USWC ports because of fear of (a) labor strife along the West Coast this summer or (b) another round of extremely congested conditions at USWC ports or (c) some other ephemeral condition.

Exhibit 2 presents data on outbound loaded TEUs in April. What's immediately apparent is that America's ports continue to post depressing export numbers. Nationally, mainland U.S. ports handled 5.3% fewer outbound loads than they had in April 2021. The fall-off has been especially noticeable along the Pacific Coast, where ports on both sides of the U.S.-Canada border recorded a 13.5% drop in outbound loads from a year earlier. Only the Gulf Coast ports showed a year-over-year gain in outbound loads in April.

Exhibit 3 shows the total (full + empty) YTD container traffic over the first four months of 2022. For

Exhibit 3 April 2022 YTD Total TEUs

	Apr 2022 YTD	Apr 2021 YTD	% Change	Apr 2020 YTD	% Change
Los Angeles	3,569,391	3,539,397	0.8%	2,488,748	43.4%
Long Beach	3,281,477	3,122,316	5.1%	2,202,650	49.0%
San Pedro Bay Ports	**6,850,868**	**6,661,713**	2.8%	**4,691,398**	46.0%
NYNJ	3,189,378	2,848,979	11.9%	2,316,907	37.7%
Georgia	1,877,598	1,815,109	3.4%	1,415,755	32.6%
Houston	1,237,876	1,027,039	20.5%	994,627	24.5%
Virginia	1,196,163	1,085,414	10.2%	861,609	38.8%
NWSA	1,167,869	1,200,367	-2.7%	1,036,556	12.7%
Vancouver	1,157,867	1,270,234	-8.8%	1,013,078	14.3%
South Carolina	985,368	872,466	12.9%	770,017	28.0%
Oakland	790,548	852,893	-7.3%	783,582	0.9%
Montreal	560,922	545,291	2.9%	567,551	-1.2%
JaxPort	433,623	466,214	-7.0%	394,214	10.0%
Miami	408,261	426,637	-4.3%	348,857	17.0%
Port Everglades	375,831	349,338	7.6%	340,693	10.3%
Prince Rupert	350,934	330,381	6.2%	330,036	6.3%
Maryland	321,974	335,385	-4.0%	342,275	-5.9%
Philadelphia	244,929	223,240	9.7%	209,112	17.1%
New Orleans	147,513	177,071	-16.7%	203,010	-27.3%
Hueneme	90,554	72,466	25.0%	65,354	38.6%
San Diego	52,229	50,954	2.5%	50,519	3.4%
Portland, Oregon	48,564	28,694	69.2%	13,741	253.4%
Boston	35,556	75,955	-53.2%	92,994	-61.8%
US/Canada Total	21,524,425	20,715,840	3.9%	16,841,885	27.8%
US Only Total	19,454,702	18,569,934	4.8%	14,931,220	30.3%

Source Individual Ports

April 2022 TEU Numbers Continued

the U.S. ports we monitor, total container movements came to 19,454,702 TEUs, a 4.8% (+884,768 TEUs) increase over the same months in 2021. A modest majority of the U.S. and Canadian ports showed increased traffic over this point a year earlier, with the 340,399 TEU increase at PNYNJ and the 210,837 TEU gain at Houston the most impressive. The three Canadian ports we track collectively handled 2,069,723 TEUs through April, a 3.6% decline from last year.

Weights and Values

Here we try to peer inside all those boxes enumerated in Exhibits 1-3 to get a sense of how tonnage matches up with dollar values. The percentages in Exhibits 4 and 5 are derived from data compiled by the U.S. Commerce Department from documentation submitted by the importers and exporters of record. Commerce then makes the data available with a time-lag of approximately five weeks.

Exhibit 4 testifies to the USWC's declining share of containerized imports through mainland U.S. ports in April. For imports, USWC tonnage and value shares were uniformly lower than a year ago. Factoring in the box trade through the smaller Pacific Coast ports we track, the overall USWC share of U.S. mainland ports' container import trade with all other nations slid to 35.5% from 38.8% in tonnage terms and to 40.0% from 44.7% in value terms.

On the export front, the San Pedro Bay ports saw a bump in their share of containerized tonnage shipped abroad,

Exhibit 4 Major USWC Ports Shares of U.S. Mainland Ports Worldwide Container Trade, April 2022

	Apr 2022	Mar 2022	Apr 2021
Shares of U.S. Mainland Ports Containerized Import Tonnage			
LA/LB	26.7%	28.6%	28.0%
Oakland	3.2%	3.1%	4.0%
NWSA	3.7%	4.3%	4.9%
Shares of U.S. Mainland Ports Containerized Import Value			
LA/LB	31.9%	33.6%	33.7%
Oakland	2.7%	3.0%	3.8%
NWSA	4.2%	5.2%	6.3%
Shares of U.S. Mainland Containerized Export Tonnage			
LA/LB	20.8%	19.7%	19.2%
Oakland	6.7%	6.5%	7.6%
NWSA	5.6%	5.7%	6.9%
Shares of U.S. Mainland Conatainerized Export Value			
LA/LB	16.9%	16.8%	17.8%
Oakland	6.5%	6.7%	7.3%
NWSA	3.0%	3.4%	3.9%

Source: U.S. Commerce Department.

Exhibit 5 Major USWC Ports Shares of U.S. Mainland Ports Containerized Trade with East Asia, April 2022

	Apr 2022	Mar 2022	Apr 2021
Shares of U.S. Mainland Ports Containerized Import Tonnage			
LA/LB	44.0%	46.3%	46.0%
Oakland	3.6%	3.6%	5.1%
NWSA	6.0%	7.0%	7.7%
Shares of U.S. Mainland Ports Containerized Import Value			
LA/LB	48.2%	49.2%	50.9%
Oakland	3.2%	3.6%	4.7%
NWSA	6.4%	7.8%	9.4%
Shares of U.S. Mainland Containerized Export Tonnage			
LA/LB	38.6%	35.5%	31.7%
Oakland	9.8%	9.4%	10.4%
NWSA	10.2%	10.4%	11.5%
Shares of U.S. Mainland Conatainerized Export Value			
LA/LB	37.2%	34.9%	35.9%
Oakland	10.6%	10.9%	12.5%
NWSA	6.6%	7.4%	8.2%

Source: U.S. Commerce Department.

April 2022 TEU Numbers Continued

while Oakland and the NWSA ports saw declines. Overall, though, USWC ports large and small saw their shares of containerized export tonnage slip to 34.1% from 34.4%, while their combined share of containerized export value declined to 27.2% from 29.6% in April 2021.

Exhibit 5 displays the USWC shares of U.S. containerized trade with the Far East in April. On the import side, USWC shares dipped across the board. Including smaller ports, the USWC share of containerized import tonnage dropped to 54.8% from 60.0% a year earlier. In value terms, all USWC ports great and small sustained a drop in their combined share to 59.0% from 65.9%.

As for containerized export tonnage to East Asia, only the San Pedro Bay ports posted gains. However, such was the bump in exports at LA/LB that the overall USWC share of containerized export tonnage rose to 60.1% from 55.1% year-over-year. The improvement in the San Pedro Bay ports' share of export value was not enough to overcome the declines at Oakland and at the big Washington State ports. As a result, the overall USWC share of the value of U.S. containerized exports headed to East Asia dipped to 55.5% from 57.4% a year earlier.

Congress to the Rescue

President Biden signed the much-anticipated Ocean Shipping Reform Act of 2022 into law the other day. Whether it proves to be the panacea its proponents promised it would be falls into that wait-and-see category. It seeks to address several complaints from shippers, especially regarding detention and demurrage charges. That's more of an insider's issue that was unlikely to galvanize widespread support for legislation. What got the measure though Congress was the desire to, paraphrasing President Biden, figuratively punch the foreign-owned ocean carriers in the nose. Substantial hikes in oceanic shipping fees and the resulting sharp increases in shipping line profits was one factor. Another was the alleged role of the ocean carriers and port terminal operators in failing to handle export containers bearing farm produce as expeditiously as they have been shipping empty containers back to Asia.

Judging from recent media reports, the OSRA – along with new U.S. Department of Agriculture subsidies to growers exporting through USWC ports – will go a long way to prevent such travesties as occurred this May, when shippers of three of California's top five agricultural exports (almonds, pistachios, and walnuts)…

[Pausing here to consult the latest data]

…each exported more tonnage than in any previous May.

That, at least, is what the organizations responsible for administering each crop's federal marketing order are reporting.

According to the California Almond Board, export tonnage in May totaled 87,727 metric tons, up 29.4% from 67,817 metric tons the previous May. That established a new high watermark for almond exports in the month of May. Almonds, by the way, are the top agricultural export of California, America's top state for agricultural exports.

Meanwhile, walnut exports totaled 40,133 tons, according to the California Walnut Board. That not only represented a 55.8% year-over-year jump, it also set a new record for walnut exports in the month of May.

Similarly, the Administrative Committee for Pistachios is reporting that shipments of pistachios to overseas markets in May amounted to 22,770 tons, a 65.3% surge over the 13,779 tons exported a year earlier. That, too, was more than in any previous May.

Yay! Jeff Tops Bob in Latest Top 100 U.S. Importer Standings

Regular readers may recall our keen interest in whether the *Journal of Commerce*'s latest (2021) ranking of the Top 100 U.S. importers would show that an outfit called Bob's Discount Furniture would again triumph over that business venture Jeff Bezos started up in Seattle back in 1994. As we pointed out in our April issue, the *Journal*'s 2020 tally showed Bob (54,646 loaded import TEUs) besting Jeff (46,259 TEUs). Both trailed far, far behind Walmart's 930,000 TEUs. In fact, Bob ranked 24th ahead of Jeff's 30th spot in the *Journal*'s 2020 ranking.

The *Journal*'s brand-new standings for 2021, released a month ago, showed a couple of intriguing developments. First, while Jeff's enterprise did finally leap ahead of Bob's,

April 2022 TEU Numbers Continued

it remained the nation's 30th largest importer. In case anyone is the least bit interested, Bob, having imported 13,546 fewer TEUs than he had the previous year, slipped to 36th place.

What's even odder is that in 2021, a year in which congested ports commanded headlines worldwide, Jeff imported just 869 more loaded TEUs than he had the year before. Even more peculiar, the new list credits #1 importer Walmart with 930,000 import loads in both years, even though #2 Target posted a 19.1% increase and #3 Home Depot a 13.4% gain.

What with all the talk about ports being swamped by surging imports, we would have expected that, between them, the Walton clan and Jeff might have brought in rather more than the 869 additional loaded TEUs than the *Journal* believes they collectively did.

CARB's Anti-Tire Mandates

We're waiting for the California Air Resources Board (CARB) to adopt new standards on tire pollution. Since the advent of the Prius and subsequent iterations of stealth passenger cars, pedestrians and bicyclists have learned that it's the sound of rubber tires on pavement rather than the throaty roar of internal combustion engines that heralds the presence of potentially lethal vehicles.

Comes now a report alleging that tires produce way more particle pollution than exhaust fumes. "Tyres [we're quoting from an article in the *Guardian*] are rapidly eclipsing the tailpipe as a major source of emissions from vehicles," said Nick Molden, at Emissions Analytics, the leading independent emissions testing company that did the research. "Tailpipes are now so clean for pollutants that, if you were starting out afresh, you wouldn't even bother regulating them."

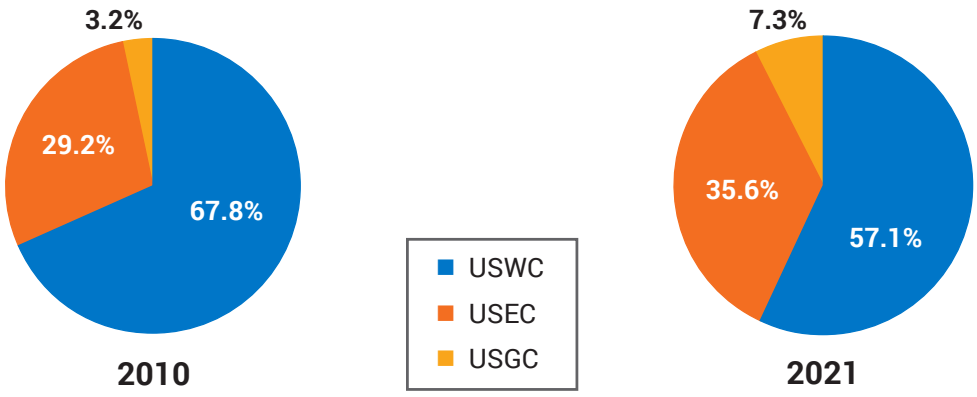
As CARB's website observes: *Vehicles emit inhalable particles from two major sources: the exhaust system, which has been extensively characterized and regulated; and non-exhaust sources including brake wear, tire and road wear, clutch wear and road dust resuspension. The non-exhaust sources have not been regulated because they are difficult to measure and control. However, with increasingly stringent standards for exhaust emissions, the non-exhaust fraction has become increasingly important. Model predictions (both MOVES and EMFAC) suggest that traffic-related emissions of both PM2.5 and PM10 will eventually be dominated by non-exhaust sources.*

Don't get us started on particulate emissions from brakes.

Charting the Shift in Imports from East Asia

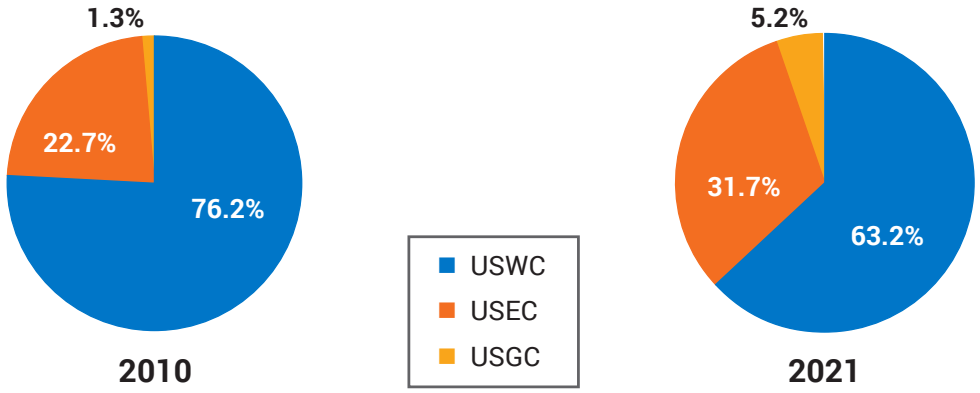
Any way you slice the pie, it's clear that more goods from East Asia are flowing to U.S. markets via ports on the East and Gulf Coasts. Here are a couple of pies that demonstrate the shifts in terms of tonnage (**Exhibit 6**) and the value of the containerized goods (**Exhibit 7**). What's perhaps interesting is that, while the U.S. West Coast ports' tonnage shares dropped 10.7% percentage points

Exhibit 6 **Shifting Shares of Containerized Import Tonnage from East Asia**
Source: U.S. Commerce Department



April 2022 TEU Numbers Continued

Exhibit 7 **Shifting Shares of Containerized Import Value from East Asia**
Source: U.S. Commerce Department



between 2010 and 2021, their value share fell even faster by 13.0%.

So, what's at the bottom of this shift from West to East? To listen to some commentators, it's all about importers fleeing congestion at USWC ports or being fearful that the ILWU might again disrupt trade through Pacific Coast ports. No doubt, that's part of the story. But a much more fundamental factor can be found in a clue offered in this newsletter's Exhibit 2, which shows that containers bearing U.S. exports overwhelmingly originate in East and Gulf Coast ports.

Through April of this year, 64.4% of U.S. containerized export tonnage sailed from USEC and USGC ports. This is not a recent development. East and Gulf Coast ports have long generated the preponderance of America's containerized export trade. What this reflects, more than anything else, is the location of the bulk of the nation's goods-producing industries.

Although manufacturing employment in states like California and Washington has fallen sharply since 2000, manufacturing output has not declined in terms of the value of what's being produced. What's happened is that there has been a dramatic shift in the types of exportable goods being produced since the collapse of the dot. com boom two decades ago and the earlier contraction of the defense-related industry that had buoyed the economies of Southern California and the Seattle region.

The exportable goods now produced by West Coast manufacturers are less and less the kinds of things shipped by sea. Instead, they are now much more likely to be the sort of high-value, low-weight advanced technology items that are typically shipped by air. Through April of this year, for example, airborne exports from California, Oregon, and Washington State have totaled $115.36 billion as opposed to the $44.34 billion in exports from those states that were shipped overseas in containers. By comparison, airborne exports from states along the East and Gulf Coasts amounted to $89.32 billion, while containerized exports were valued at $50.17 billion.

So what?

Start by overlaying a map of where the nation's durable and non-durable goods manufacturing takes place and a map showing where most Americans reside.

Next blend in the billions of federal and state dollars that have been invested in developing East and Gulf Coast ports (investments scarcely matched along the West Coast).

Then open a wider set of locks through Panama.

What's the result? Seaborne trade is now increasingly able to go where it always wanted to go, namely to ports adjacent to centers of industry and population.

Jock O'Connell's Commentary:

Is Oakland really a baseball town?

With a key vote by the San Francisco Bay Conservation & Development Commission on the fate of Howard Terminal coming up on June 30, I thought someone should raise an impertinent question: Do the Oakland A's really want to stay in Oakland?

A's president Dave Kaval and the city's mayor both like to say that the A's are "Rooted in Oakland." Of course, the A's previously had roots elsewhere. As a charter member of Major League Baseball, the Athletics were rooted in Philadelphia from 1901 to 1955, when the franchise pulled up those roots and replanted itself in Kansas City. They stayed rooted there for just thirteen years, during which time they routinely traded their top players to wealthier clubs. (Sound familiar?) They then put down new roots in Alameda County.

Now, in the most recent manifestation of the team's itinerant DNA, the franchise's owner (a billionaire, don't you know) is threatening to replant the team's roots in the Nevada desert unless Oakland's City Council accedes to a list of demands involving a new stadium and a massive real estate development next door to the Port of Oakland.

Problem is that, as much as Oakland's mayor may feel passionately about keeping the A's in Oakland, A's rooters have been much less enthusiastic about the team. Specifically, and measurably, attendance at the team's home games hardly measures up to the overbearing rhetorical support the franchise gets from Bay Area sportscasters who, probably more than anyone else, have a vested interest in keeping the ballclub from moving to a less hospitable climate.

What's puzzling is why Oakland A's owner John Fisher wants to build a stadium on the Oakland waterfront that can accommodate 34,000 spectators when the team routinely draws crowds measured in four digits. Last year, for example, average attendance at whatever the Oakland-Alameda County Coliseum is called these days was just 8,767. Only the Miami Marlins suffered a higher level of fan indifference.

Total attendance at A's home games last year numbered 701,430. That's actually fewer than the 869,703 fans the old Philadelphia Athletics drew at Shibe Park in 1925. More people (726,639) showed up to watch the A's play in Kansas City's Municipal Stadium in 1967, the year before the team decamped for Oakland.

Through the A's first thirty-four home games, average homefield attendance has been 8,449. Let that sink in: Of the thirty Major League Baseball teams, the Oakland A's have drawn the fewest spectators. The biggest crowd so far this year came out on June 3 to see the A's host the Boston Red Sox. 17,852 spectators saw that game. Impressive? Not exactly. What's been Oakland's peak turnout this season was actually less than the *average* home attendance of twenty-two other MLB teams.

There are a couple of schools of thought explaining the team's pathetic attendance numbers. One is management's penchant for raising ticket prices after disappointing fans by trading away rising stars before the players are in a position to demand a salary commensurate with their talents.

The alternate explanation, the dodge favored by Fisher and Kaval, is that the Coliseum is a substandard relic that repels fans.

That blame-the-infrastructure excuse is sheer flimflam. Forget that the Coliseum is infinitely more accessible via freeway, BART, and even Amtrak than the proposed wrong-side-of-the-tracks waterfront facility Fisher and Kaval are pushing. Forget that their favored location does not offer the acres of supervised parking that the Coliseum features. Forget about tailgate parties before the game. Forget about a short walk to your seat.

But to listen to Kaval and his supporters, the Coliseum is just too old and antiquated to attract many fans. Clearly, that's why a team playing in a quirky 110-year-old ballpark in Boston -- with hundreds of seats offering views obstructed by the 26 support poles that hold up the upper deck -- drew 2.5 times as many fans per game last year as did the A's.

Maybe that's because Boston's a baseball town and Oakland isn't. Or, much more likely, it's because -- unlike the skinflint who owns the A's -- the proprietor of the Red Sox is willing to pay the price of putting a competitive team on the field.

For those keeping score at home, the A's now vie with the

Commentary Continued

Baltimore Orioles for having the lowest payroll in baseball. They got there by stripping their lineup of its most promising players and slashing an already meager payroll. Not surprisingly, the team's 23-46 win-loss record is the very worst in Major League Baseball.

Seriously now, does anyone really think that a nifty new waterfront stadium will prompt Fisher and Kaval to give Oakland fans a team worth watching? Their proposed ballpark is simply a lure to get public approval of the massive real estate development that will surround it. Once it becomes evident that Fisher and Kaval are not going to invest in the ball club, fans will have little reason to risk crossing the tracks, and attendance will regress to current levels.

Let's be clear. A new ballpark is not about baseball or the interests of local fans. And it's definitely not in the interests of the neighboring Port of Oakland, an infinitely more vital economic asset than a sports franchise. Instead, it's about all those condominiums, hotel rooms, shops and restaurants that will earn a billionaire further billions. As for baseball, if the A's play more than five seasons in the waterfront stadium Fisher and Kaval want to build, it may only be because they sold the team.

Disclaimer: The views expressed in Jock's commentaries are his own and may not reflect the positions of the Pacific Merchant Shipping Association.

The Emerging Threat to Port Industrial Lands and Why You Should Care

By Jordan Royer, Vice President, Pacific Merchant Shipping Association

The challenges to the supply chain over the last two years are well documented – warehouses bursting at the seams, stacks of containers, rail car and chassis equipment shortages, ships at anchor. All of us have been impacted by it. It is out in the open.

But there is another challenge to the supply chain and the entire manufacturing and industrial economy: land use planning. Let me explain.

Photo courtesy of Northwest Seaport Alliance

While the language of land use planning can be dry and obtuse, it can also be wielded by powerful interests skilled at exploiting loopholes and funding political campaigns of those who will make decisions that dictate how a city will grow and what kind of jobs will be created and sustained – and on the flip side, what kind of jobs will go away. In Seattle and Tacoma, the jobs at risk are good paying, family wage jobs in the port industrial areas.

Under Washington State's Growth Management Act (GMA), ten manufacturing industrial centers (MICs) were created – two in Seattle, and one in Tacoma. These MIC zones in Seattle and Tacoma focus on port industrial and manufacturing activities while ensuring that incompatible uses are not allowed. While there are always overlays, loopholes, and exceptions, the protections have worked out fairly well.

Now however, there are new challenges on the horizon. In Seattle, there is a lot of interest in developing housing directly adjacent to Terminal 46, a container terminal that is now stacked with containers due to a congested supply chain. A process that was started with former Mayor

The Emerging Threat Continued

Jenny Durkan, now being advanced by current Mayor Bruce Harrell involves a stakeholder group to study how to protect industrial lands. Stakeholders included port and industrial leaders and waterfront labor representatives all with a strong interest in protecting industrial jobs. It also includes developers and property owners who are making the argument that bringing in new housing can help relieve the region's housing price crunch, and that Seattle doesn't need as much industrial land as it once did. The example of industrial waterfront activities migrating from San Francisco to Oakland is often cited by those who believe industry would be better focused in Tacoma leaving Seattle to focus more on urban growth and entertainment.

The good news is that the Harrell administration seems genuinely interested in supporting the Port of Seattle, waterfront trade and jobs. The last two years have shown how important these activities are. The bad news is housing advocates will continue to make the case that Seattle shouldn't be focused on industrial jobs and that with the new light rail line going through the industrial areas, housing should be given a priority – threatening waterfront operations and jobs. Information about the process can be found here.

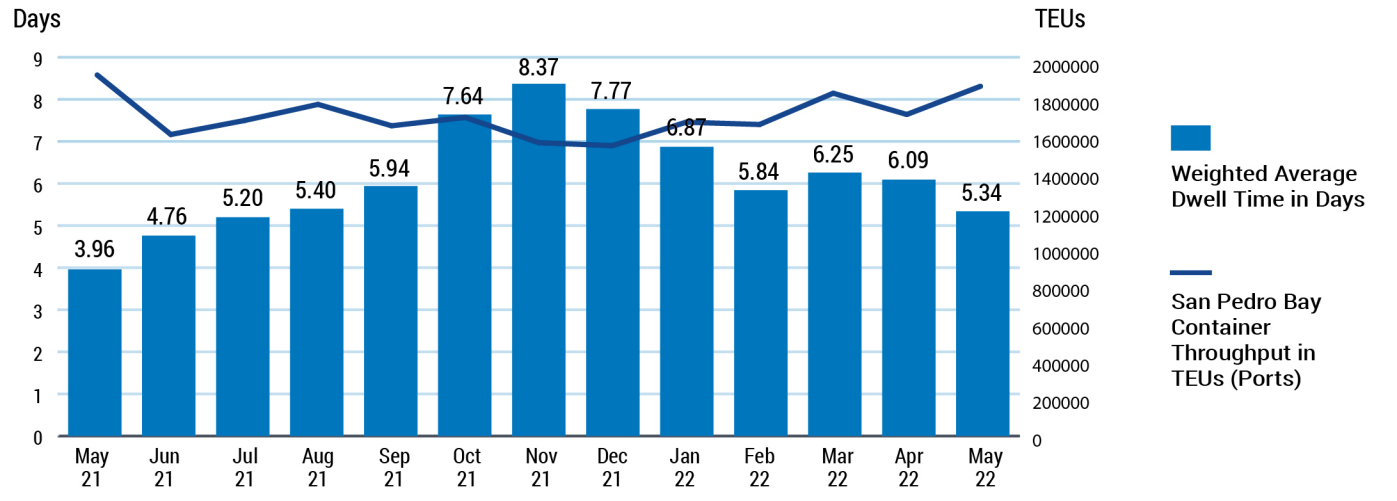
Meanwhile, Tacoma is going through a similar planning process where neighbors of the port, the Puyallup Tribe, and environmentalists are trying to limit business growth if connected to fossil fuels. There continues to be controversy over the liquefied natural gas (LNG) facility that has been built to supply cleaner fuel to ocean going vessels. The Subarea Plan, as it is called, has given advocates a tool to make it more difficult for businesses to operate, and although a push to require conditional use permits has been turned back, there will likely be other creative ways to make it harder to operate in the Tideflats MIC. Employees, businesses, and port leaders need to continue to engage in the planning process to make sure their voices are represented in the final product. Information on the Subarea Plan can be found here.

Seattle and Tacoma are growing cities. Planning documents used by elected officials need to be updated. Careful thought needs to be given to the kind of infrastructure that will be required to accommodate growth. But the bedrock industries that have operated at full strength over the last two years of the pandemic, providing needed products to our community, should be considered as well. These businesses cannot operate just anywhere. The State Legislature recognized this when they created the MICs under Growth Management. We need to make sure that local elected officials in Seattle and Tacoma recognize this as well, and we need to be present when land use language is developed to make sure maritime and manufacturing businesses can continue to grow and thrive.

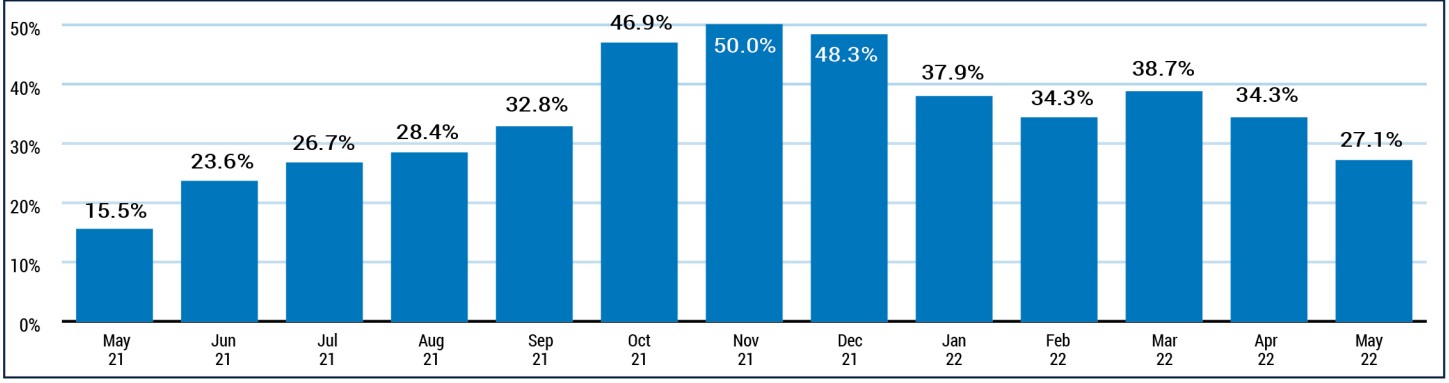
Interested in membership in PMSA?
Contact Laura Germany for details at: lgermany@pmsaship.com or 510-987-5000.

Import Dwell Time Is Down For May While Rail Dwell Time Is Up

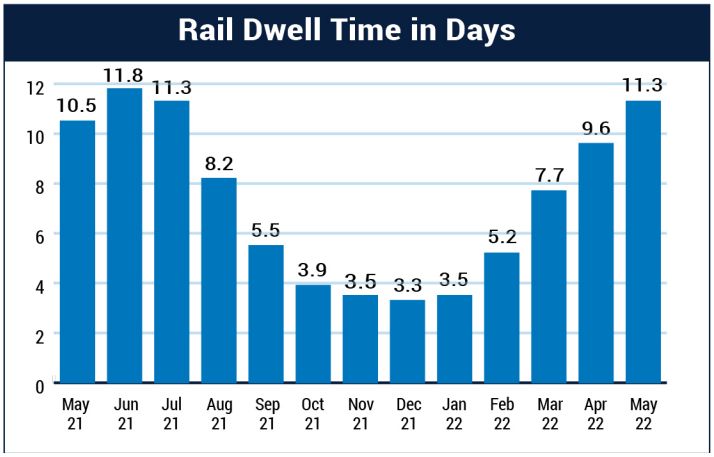
San Pedro Bay Weighted Average Inbound Laden Container Dwell Time in Days



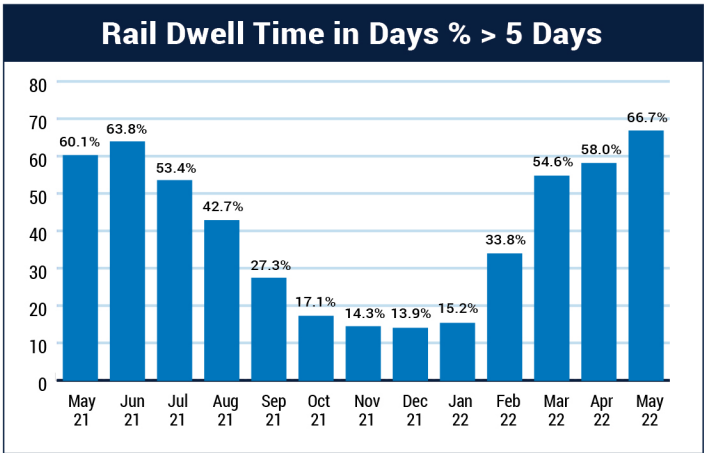
Dwell Time in Days % > 5 Days



Rail Dwell Time in Days



Rail Dwell Time in Days % > 5 Days



PMSA Copyright © 2022
It is prohibited by law to forward this publication to any other person or persons. This material may not be re-published, broadcast, rewritten or distributed without written permission from PMSA. Follow PMSA on Twitter @PMSAShip and Facebook.