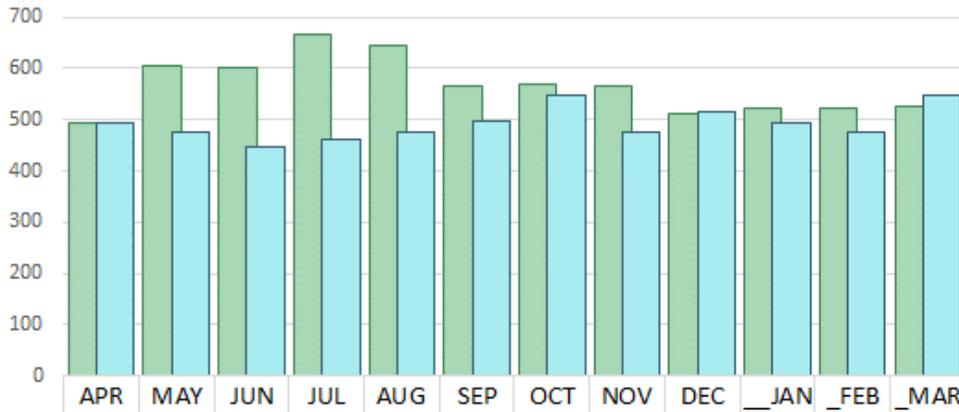


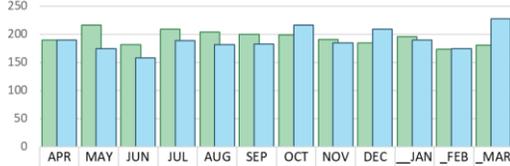
## Puget Sound District Total Vessel Moves Per Month During Pandemic Year and Preceding Year



■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	495	606	602	667	644	567	568	564	513	522	522	527
2020 April - through 2021 March	492	475	446	460	475	498	548	477	515	492	476	546

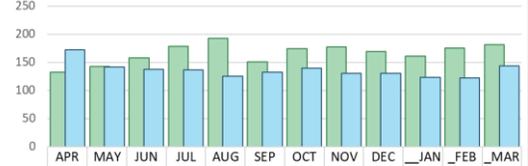
### CONTAINER VESSELS



■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	189	216	181	209	204	200	199	191	184	196	173	180
2020 April - through 2021 March	189	174	158	188	181	182	216	184	209	189	174	227

### TANKER VESSELS



■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	132	143	158	178	193	151	174	177	169	161	175	181
2020 April - through 2021 March	172	141	137	136	125	132	139	130	130	123	122	144

### BULKER VESSELS



■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	85	83	63	70	58	53	74	97	72	85	79	77
2020 April - through 2021 March	80	86	71	44	99	110	103	90	96	107	96	91

### CARRIER & RO-RO



■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	66	62	77	82	77	63	68	72	65	52	61	62
2020 April - through 2021 March	35	49	41	52	46	56	62	53	54	49	58	63

### PASSENGER



■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	5	63	95	93	90	72	10	0	0	2	1	0
2020 April - through 2021 March	1	0	0	0	0	0	0	0	0	0	0	2

### OTHER

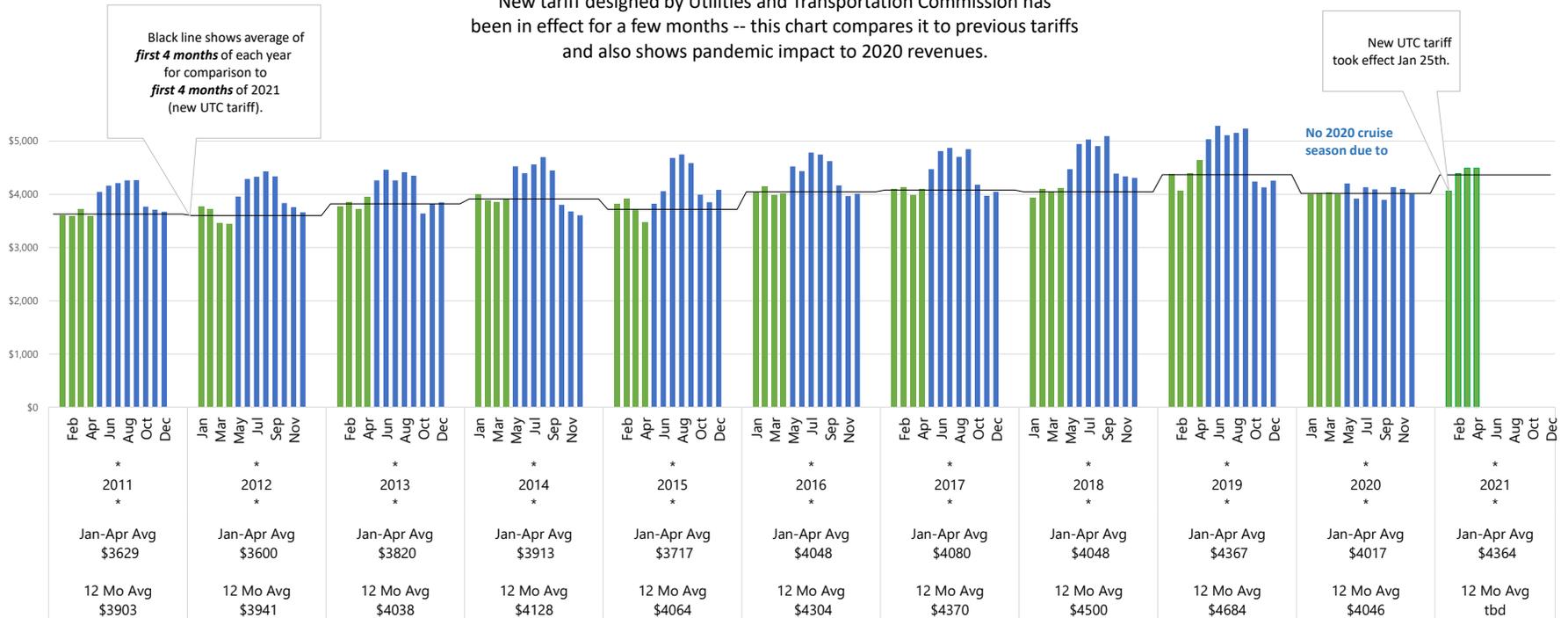


■ 2019 April - through 2020 March  
■ 2020 April - through 2021 March

	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
2019 April - through 2020 March	18	39	28	35	22	28	43	27	23	26	33	27
2020 April - through 2021 March	15	25	39	40	24	18	28	20	26	24	26	19

### Puget Sound District Revenue per Assignment 2011-2021

New tariff designed by Utilities and Transportation Commission has been in effect for a few months -- this chart compares it to previous tariffs and also shows pandemic impact to 2020 revenues.





# GREENTECH 2021

## WEDNESDAY, JUNE 2

Pacific Time (Seattle)	Eastern Time (Montreal)	SESSIONS & SPEAKERS
8:00 am -9:30 am	11:00 am - 12:30 pm	<b>OPENING SESSION</b> <ul style="list-style-type: none"> <li>Welcoming addresses</li> </ul> <b>THE CUSTOMERS' PERSPECTIVE ON SUSTAINABLE SHIPPING</b> <ul style="list-style-type: none"> <li>Panel discussion</li> </ul>
9:30 am	12:30 pm	<b>NETWORKING &amp; EXHIBITION VISIT</b>
10:30 am - Noon	1:30 pm - 3:00 pm	<b>THE PATH TO DECARBONIZATION</b> <ul style="list-style-type: none"> <li>Bryan Comer, <b>International Council on Clean Transportation</b>: Principles for evaluating the sustainability of marine fuels</li> <li>Paul Blomerus, <b>Clear Seas</b>: Unintended consequences: Identifying conflict between the dual objectives of reducing greenhouse gas emissions as well as air pollution from marine shipping</li> <li>Peter Keller, <b>SEA-LNG Ltd.</b>: Waiting is not an option</li> <li>Amanda McAlpin, <b>Argonne National Lab</b>: Analytical tools, funding, and collaboration with U.S. Department of Energy's network of clean cities to help ports and tenants meet sustainability goals</li> </ul>
Noon	3:00 pm	<b>NETWORKING &amp; EXHIBITION VISIT</b>
12:30 pm - 2:00 pm	3:30 pm - 5:00 pm	<b>TERMINALS ADVANCE ENERGY AND EFFICIENCY</b> <ul style="list-style-type: none"> <li>Sid-Ali Djebbar, <b>Montreal Gateway Terminals Partnership</b>: Electrification of gantry cranes</li> <li>Marko Dekovic, <b>Global Container Terminals</b>: The GCT Deltaport Intermodal Rail Yard Expansion Project</li> <li>Elizabeth Sheehan, <b>Climate Smart</b> and Shahira Esmail, <b>Radicle</b>: Supporting decarbonization and net-zero goals among tenants in Northwest ports</li> </ul>



# GREENTECH 2021

## THURSDAY, JUNE 3

Pacific Time (Seattle)	Eastern Time (Montreal)	SESSIONS & SPEAKERS
8:00 am -9:30 am	11:00 am -12:30 pm	<b>INTERNATIONAL LEADERS IN SMART SHIPPING</b> <ul style="list-style-type: none"> <li>Dita Bruijn, <b>Port of Rotterdam/PortXchange</b>: How just-in-time sailing contributes to shipping decarbonization</li> <li>Lee Kindberg, <b>Maersk</b>: Progress towards zero emissions shipping</li> <li>Fabrice Klein, <b>Port of Bordeaux</b>: Green port for sustainable city and ship industries</li> <li>Gavin Allwright, <b>International Windship Association</b>: Re-wind Not Rewind – How Wind Propulsion is a Key Decarbonisation Solution for the 2020s</li> </ul>
9:30 am	12:30 pm	<b>NETWORKING &amp; EXHIBITION VISIT</b>
10:30 am -Noon	1:30 pm -3:00 pm	<b>PROTECTING MARINE MAMMALS AND BIODIVERSITY</b> <ul style="list-style-type: none"> <li>Denis Tran, <b>Transport Canada</b>: Quiet vessels initiative</li> <li>Scott Gende, <b>United States National Park Service</b>: Whale strike reduction measures in partnership with the Southeast Alaska Pilots Association</li> <li>Kim Dunn, Stephanie Hewson, and Mike Kofahl, <b>World Wildlife Fund</b>: Reducing Impacts from Shipping in Marine Protected Areas: New resources for the shipping industry</li> <li>Stephanie MacNeil, <b>Khtada Environmental Services</b> and Jason Scherr, <b>Prince Rupert Port Authority</b>: Innovation in monitoring and protection of Marine Mammals during Fairview Terminal Construction</li> </ul>
Noon	3:00 pm	<b>EXHIBITION VISIT</b>
12:30 pm -2:00 pm	3:30 pm -5:00 pm	<b>CERTIFICATION CEREMONY VIRTUAL NETWORKING EVENT</b>



# GREENTECH 2021

## FRIDAY, JUNE 4

Pacific Time (Seattle)	Eastern Time (Montreal)	SESSIONS & SPEAKERS
8:00 am -9:30 am	11:00 am - 12:30 pm	<b>SUSTAINABLE INFRASTRUCTURE</b> <ul style="list-style-type: none"> <li>• Rob Schweinfurth, <b>United States Environmental Protection Agency</b>: Preparing for strategic green infrastructure investments</li> <li>• Karen Imas, <b>Waterfront Alliance</b>: Waterfront Edge Design Guidelines: Resilience and innovation in industrial waterfronts (featuring McInnis Cement)</li> <li>• Sophie Boisvert, <b>Norda Stelo</b>: Intelligently increase the sustainability of port assets to become a better societal partner</li> <li>• Adam Tindall-Schlicht, <b>Port Milwaukee</b>: Rebuilding resilient port infrastructure after a severe weather event</li> </ul>
9:30 am	12:30 pm	<b>NETWORKING &amp; EXHIBITION VISIT</b>
10:30 am - Noon	1:30 pm - 3:00 pm	<b>SHIP OWNERS PARTNER AND PILOT TECHNOLOGIES</b> <ul style="list-style-type: none"> <li>• Dave Belisle, <b>Algoma</b>: Integrated agnostic performance management system</li> <li>• Nick Hunter, <b>NETSCO</b>: Key ingredients for a successful LNG towboat conversion</li> <li>• Jennifer States, <b>Washington Maritime Blue</b> and Matthew Lankowski, <b>Glosten</b> (w/ Kitsap Transit, Port of Anacortes, Port of Bellingham, Port of Skagit, Bieker Boats, DNV, and Tacoma Power): Advancing green passenger ferry innovations through public-private partnerships</li> <li>• Rhiannah Carver and Yousef El Bagoury, <b>CSL Group</b>: CSL: Biofuel testing on Great lakes vessels</li> </ul>
Noon	3:00 pm	<b>NETWORKING &amp; EXHIBITION VISIT</b>
12:30 pm - 2:00 pm	3:30 pm - 5:00 pm	<b>PASSENGER VESSELS ELECTRIFY</b> <ul style="list-style-type: none"> <li>• Sean Caughlan, <b>Glosten</b>; Luke Briant, <b>Siemens Energy</b>; Rainer Altmeppen, <b>Stemmann-Technik</b>; and Matthew von Ruden, <b>Washington State Department of Transportation Ferries Division</b>: Washington State Ferries' Hybrid Evolution</li> </ul>

**State of Washington  
Pilotage Commission  
May 25, 2021**

**Grays Harbor District Report**

In April we had 3 dry bulk vessels for a total of 8 jobs. Capt. D'Angelo continues to have the watch. Capt. McMullen has requested to cease evaluation trips and transfer to PSP District for licensure. Our outlook for May arrivals is 6 vessels and 2 barges. This includes 4 dry bulk, 1 tanker and 1 general cargo military.

**New Exhaust for the Chehalis Pilot Boat**

Contractor replaced the mufflers on the Chehalis this week. Scope of work was to remove the existing two mufflers and install a new single muffler. The new single muffler was designed by Harco Manufacturing in Newburg OR. The critical grade Harco is the quietest silencer for Detroit 1271 NA 440 hp that they make.



### **Terminal 3 Downstream Dolphin Replacement**

All contract documents have been executed and a Notice to Proceed has been issued for the project. The steel piling supplier is not able to provide the pipe piling at this time for the project due to sever COVID-19 cases in India where the pipe mill is located. A local pipe contractor has stated they have piling in stock but will require additional splicing required to fabricate the 8-pile needed for the project. Contractor is requesting a change order for the project be added to bid item 3 for the T-3 Downstream Dolphin replacement to cover the additional cost for pipe pile.

Staff has reviewed the request and has been approved by the Executive Director. The change order will provide the needed material for the project with no delay in the contract term. Contractor is planning to start July 15, 2021 and will be completed by February 14, 2022.

### **Jet Array Pump Mount**

We received a letter from the contractor requesting additional days be added to the 30-day contract term. Extended lead time is needed for fiberglass grating fabrication and delivery. The contractor requested an additional 6-weeks. Staff has approved the request and completion date is now set at July 17, 2021.

### **Terminal Maintenance Dredging**

Staff has been in conversations with the contractor regarding Round 2 Dredging for this contract. HME plans to start our dredging on July 16, 2021. We will plan to work with the contractor on our schedule for work at Terminals 1,2, and 4.

### **Pilot Boat VEGA**

Brusco, the operator for the VEGA has completed several upgrades and repairs over the last few weeks including a new fender tire arrangement, boarding platform, and replacement of the deteriorated main cabin door.



## **Business Development**

Work continues on marketing study for the recently acquired 55-acre, former 520 Pontoon site adjacent to PGH Terminal 4.

PNWR, a wood pellet exporter is continuing their permitting and due diligence and requesting a letter of intent for 30 acres at Terminal 3.

Export Logs. Customer began deliveries 2 weeks ago and plans a July vessel.

Inquiry on space for bulk loading and storage (likely grain in bags).

BWC (formerly Contanda): Tank conversion is underway for new product line.

REG: Looking at several expansion projects and other alternative fuel projects.



## A First Glimpse at the TEU Tallies for March

**Note:** *The ports we survey take anywhere from a few days to a few weeks to report their container trade statistics. Because West Coast ports are generally much quicker in releasing their monthly TEU counts than their rival ports elsewhere in the country, these “First Glimpse” numbers are necessarily incomplete and may give a misleading indication of the latest trends.*

Several ports have already announced their March container tallies and, not unexpectedly, the year-over-year increases in inbound loads have been downright phantasmagorical. The most astonishing numbers were posted by the Port of Los Angeles, where the number of inbound loads leaped by 122.5%, more than doubling the 220,254 inbound loaded TEUs the port had handled a year earlier. So great was the year-over-year difference (269,860 TEUs) that it alone exceeded the 249,395 inbound loads in March at Savannah.

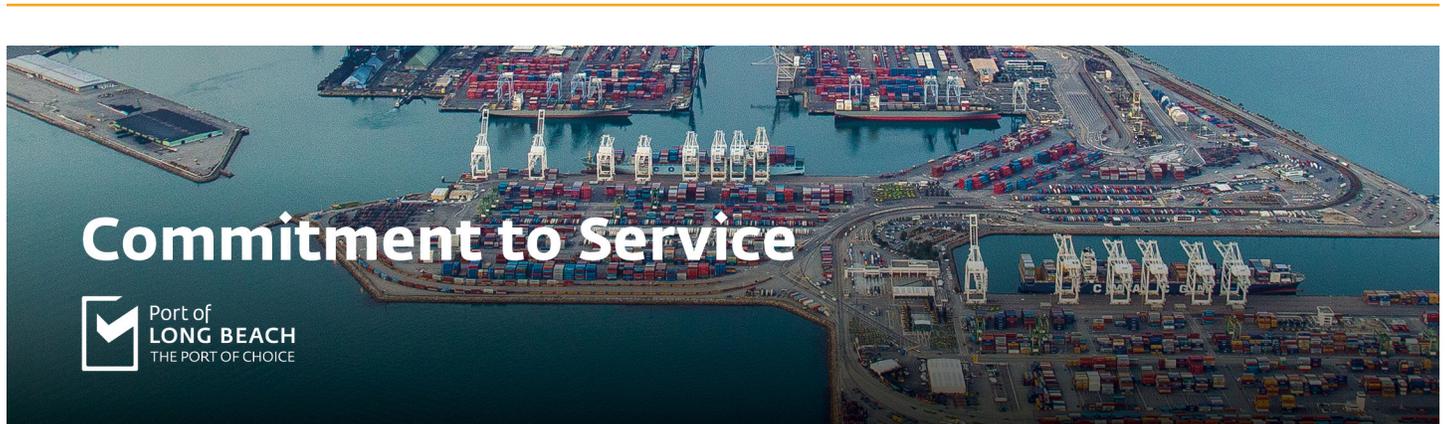
Next door, the Port of Long Beach posted a 74.0% leap in inbound loads, while up the coast the Port of Oakland recorded a 30.5% year-over-year increase. At the Northwest Seaport Alliance Ports of Seattle and Tacoma, inbound loads in March were up 66.5% from March 2020 but also up 19.6% over March 2019. Overall, the Big Five USWC ports handled 529,844 more loaded inbound TEUs than they had a year earlier, a gain of 87.4%.

Across the border in British Columbia, Vancouver reported a 51.9% bump in inbound loads, while Prince Rupert saw a 64.8% increase.

Elsewhere, inbound loads were up dramatically from the abyss that was last March at Savannah (+69.6%), Charleston (+49.8%), Houston (+45.2), and Virginia (+31.2%). Even measured against a more normal March two years ago, the gains these ports posted were also remarkable: Savannah (+33.8%); Charleston (+22.6%); Houston (+22.5%); Virginia (+21.5%).

Outbound loads were a different story, though, with the five major USWC ports shipping 0.7% fewer TEUs than they had in the dreadful month of March 2020. At Long Beach, 3.9% fewer loaded TEUs sailed from the port in March than a year earlier, but Los Angeles eked out a 1.4% year-over-year gain in outbound loads. In a particularly noteworthy development, Oakland, a major conduit for containerized agricultural exports, shipped 12.4% more loaded TEUs than it had in the same month last year. Not so positive was the experience of the Washington State Ports of Tacoma and Seattle, where export loads were down 19.2% from a year earlier.

On the East Coast, Savannah’s outbound loads were off by 1.1%. However, Charleston reported an 8.2% gain, while Virginia’s outbound loads were up 4.5%. Boston’s traffic





## A First Glimpse at the TEU Tallies for March Continued

in outbound loads did jump 30.6% in March, but only to 8,505 TEUs from 6,513 TEUs (the equivalent of a Texas-Leaguer at Fenway). Houston's number of outbound loads was off by 7.2% from a year earlier.

In British Columbia, Vancouver and Prince Rupert combined to eke out a meager 0.1% gain in outbound loads over March 2020.

## Deconstructing the February 2021 TEU Numbers

**Please note:** The numbers here are not derived from forecasting algorithms or the partial information available from U.S. Customs and Border Protection but instead represent the actual TEU counts as reported by the major North American seaports we survey each month. The U.S. mainland ports we monitor collectively handle over 90% of the container movements at continental U.S. ports.

Exhibit 1 displays the complete inbound loaded container traffic numbers for February as reported by the sixteen mainland U.S. and two British Columbian ports we monitor. Inbound loads for all eighteen ports totaled 2,107,997 TEUs, up by 21.2% (+368,864 TEUs) from a year earlier. But in what was at least a momentary ebbing of the import surge that has convulsed maritime supply chains since last spring, February's tide was

**Exhibit 1** February 2021 - Inbound Loaded TEUs at Selected Ports

	Feb 2021	Feb 2020	% Change	Feb 2021 YTD	Feb 2020 YTD	% Change
Los Angeles	412,884	270,025	52.9%	850,493	684,756	24.2%
Long Beach	373,756	248,592	50.3%	738,011	558,553	32.1%
<b>San Pedro Bay Totals</b>	<b>786,640</b>	<b>518,617</b>	<b>51.7%</b>	<b>1,588,504</b>	<b>1,243,309</b>	<b>27.8%</b>
Oakland	80,200	63,568	26.2%	157,603	151,437	4.1%
NWSA	101,091	91,660	10.3%	215,174	194,538	10.6%
<b>USWC Totals</b>	<b>967,931</b>	<b>673,845</b>	<b>43.6%</b>	<b>1,961,281</b>	<b>1,589,284</b>	<b>23.4%</b>
Boston	5,281	11,622	-54.6%	16,132	25,024	-35.5%
NYNJ	334,176	300,445	11.2%	705,568	623,088	13.2%
Maryland	38,565	36,870	4.6%	82,141	82,138	0.0%
Virginia	110,274	97,559	13.0%	241,051	206,443	16.8%
South Carolina	81,899	88,178	-7.1%	177,377	178,843	-0.8%
Georgia	189,677	170,007	11.6%	422,322	358,769	17.7%
Jaxport	22,430	26,128	-14.2%	55,990	52,826	6.0%
Port Everglades	28,875	27,651	4.4%	55,706	54,102	3.0%
Miami	41,512	37,556	10.5%	92,772	72,781	27.5%
<b>USEC Totals</b>	<b>852,689</b>	<b>796,016</b>	<b>7.1%</b>	<b>1,849,059</b>	<b>1,654,014</b>	<b>3.0%</b>
New Orleans	10,356	9,395	10.2%	19,771	21,909	-9.8%
Houston	92,434	89,923	2.8%	214,012	194,970	9.8%
<b>USGC Totals</b>	<b>102,790</b>	<b>99,318</b>	<b>3.5%</b>	<b>233,783</b>	<b>216,879</b>	<b>7.8%</b>
Vancouver	146,659	114,201	28.4%	307,842	257,807	19.4%
Prince Rupert	37,928	55,753	-32.0%	88,171	104,901	-15.9%
<b>BC Totals</b>	<b>184,587</b>	<b>169,954</b>	<b>8.6%</b>	<b>396,013</b>	<b>362,708</b>	<b>9.2%</b>
<b>US/BC Totals</b>	<b>2,107,997</b>	<b>1,739,133</b>	<b>21.2%</b>	<b>4,440,136</b>	<b>3,822,885</b>	<b>16.1%</b>
<b>US Total</b>	<b>1,923,410</b>	<b>1,569,179</b>	<b>22.6%</b>	<b>4,044,123</b>	<b>3,460,177</b>	<b>16.9%</b>
<b>USWC/BC</b>	<b>1,152,518</b>	<b>843,799</b>	<b>36.6%</b>	<b>2,357,294</b>	<b>1,951,992</b>	<b>20.8%</b>

Source Individual Ports



## Deconstructing the February 2021 TEU Numbers Continued

down 10.4% from the 2,353,358 TEUs those ports had handled just a month earlier in January.

As the numbers show, inbound loaded container traffic jumped most precipitously along the U.S. West Coast, where the major ports saw a 43.6% increase. Those five ports in California and Washington State collectively handled 50.3% of all inbound loads discharged at the sixteen American ports we track. That was up sharply from their 42.9% share a year earlier. The East Coast share of traffic in loaded TEUs discharged at the mainland U.S. we survey declined to 40.5% from 45.8% in February 2020.

Meanwhile, exports, as **Exhibit 2** reveals, continued to spiral lower. The eighteen ports we track reported outbound loads totaling 1,022,243 TEUs, a 12.9% (-151,933 TEUs) fall-off, with only Virginia and Jacksonville showing year-over-year gains. The USWC share of outbound loads from the 18 ports slipped in February to 34.2% from 34.7% a year earlier, while the USEC share rose to 47.3% from 44.9%. The 936,004 loaded TEUs that sailed from mainland U.S. ports in February was the lowest since last May's 819,877 TEUs of outbound loads.

### Weights and Values

So, of course, the TEU is the container shipping industry's preferred metric. But here, though, we offer two alternative measures – the declared weight and value of the goods housed in those TEUs. The percentages in the following exhibits are derived from data compiled by the U.S. Commerce Department that are published with a five-week time-lag.

### Exhibit 2

### February 2021 - Outbound Loaded TEUs at Selected Ports

	Feb 2021	Feb 2020	% Change	Feb 2021 YTD	Feb 2020 YTD	% Change
Los Angeles	101,208	134,469	-24.7%	220,535	282,675	-22.0%
Long Beach	119,416	125,559	-4.9%	235,670	234,183	0.6%
<b>San Pedro Bay Totals</b>	<b>220,624</b>	<b>260,028</b>	<b>-15.2%</b>	<b>456,205</b>	<b>516,858</b>	<b>-11.7%</b>
Oakland	69,588	78,280	-11.1%	138,735	156,122	-11.1%
NWSA	59,218	68,553	-13.6%	116,735	134,964	-13.5%
<b>USWC Totals</b>	<b>349,430</b>	<b>406,861</b>	<b>-14.1%</b>	<b>711,675</b>	<b>807,944</b>	<b>-11.9%</b>
Boston	4,174	5,767	-27.6%	10,866	12,732	-14.7%
NYNJ	94,698	113,801	-16.8%	203,436	232,289	-12.4%
Maryland	19,564	20,049	-2.4%	39,468	40,410	-2.3%
Virginia	87,466	80,834	8.2%	172,154	160,162	7.5%
South Carolina	67,411	74,235	-9.2%	135,348	142,740	-5.2%
Georgia	111,045	125,953	-11.8%	224,410	247,913	-9.5%
Jaxport	43,408	38,451	12.9%	87,022	80,392	8.2%
Port Everglades	29,787	34,613	-13.9%	60,582	68,096	-11.0%
Miami	26,020	34,043	-23.6%	53,630	69,367	-22.7%
<b>USEC Totals</b>	<b>483,573</b>	<b>527,746</b>	<b>-8.4%</b>	<b>986,916</b>	<b>1,054,101</b>	<b>-6.4%</b>
New Orleans	23,161	24,417	-5.1%	44,595	50,630	-11.9%
Houston	79,840	110,854	-28.0%	179,534	229,636	-21.8%
<b>USGC Totals</b>	<b>103,001</b>	<b>135,271</b>	<b>-23.9%</b>	<b>224,129</b>	<b>280,266</b>	<b>-20.0%</b>
Vancouver	74,109	84,918	-12.7%	153,303	163,074	-6.0%
Prince Rupert	12,130	19,380	-37.4%	28,748	29,115	-1.3%
<b>British Columbia Totals</b>	<b>86,239</b>	<b>104,298</b>	<b>-17.3%</b>	<b>182,051</b>	<b>192,189</b>	<b>-5.3%</b>
<b>US/Canada Total</b>	<b>1,022,243</b>	<b>1,174,176</b>	<b>-12.9%</b>	<b>2,104,771</b>	<b>2,334,500</b>	<b>-9.8%</b>
<b>US Total</b>	<b>936,004</b>	<b>1,069,878</b>	<b>-12.5%</b>	<b>1,922,720</b>	<b>2,142,311</b>	<b>-10.3%</b>
<b>USWC/BC</b>	<b>435,669</b>	<b>511,159</b>	<b>-14.8%</b>	<b>893,726</b>	<b>1,000,133</b>	<b>-10.6%</b>

Source Individual Ports



## Deconstructing the February 2021 TEU Numbers Continued

**Exhibit 4** shows how the three major USWC gateways have been faring with respect to their respective shares of containerized imports offloaded at mainland U.S. seaports. But not all containerized goods moving through U.S. West Coast ports pass through the five major gateways. In fact, some of the left coast's smaller ports have lately been expanding their collective share of the USWC container trade. The Port of Portland (Oregon) has lately been making a comeback as a container port, while the Ports of San Diego and Hueneme have been seeing fresh fruit importers transitioning to refrigerated containers from refrigerated vessels. In February, according to U.S. Commerce Department trade data, these and other smaller USWC ports handled 7.1% of all inbound containerized tonnage landed along America's Pacific Coast. That was up from 4.7% a year earlier. These "other USWC ports" also handled 6.1% of all containerized export tonnage in February, up from a slender 1.7% share a year earlier.

All USWC ports, big and small, handled 38.6% of all containerized import tonnage at mainland U.S. ports in February. That was up from 33.3% a year earlier. The same ports handled 34.8% of all containerized export tonnage from U.S. mainland ports in February, up slightly from a 34.2% share in February 2020.

In February, 52.7% of all containerized import tonnage originating in the Far East came through USWC ports, down sharply from 57.1% a year earlier.

**Exhibit 5** displays the shares of U.S. container trade involving the Far East handled by the major USWC ports. But, as noted above, not all of the container trade through USWC ports takes place at one of the five major ports. The smaller U.S. West Coast gateways accounted for 2.5% of all USWC containerized import tonnage from the Far East, up from 1.4% in February 2020. On the export side, the smaller ports along the West Coast accounted for 3.0% of all containerized shipments to the Far East in February, up from 0.4% a year earlier.

As a result, USWC ports of all sizes handled 57.9% of all containerized import tonnage into U.S. mainland ports from the Far East in February, up from 54.7% in January and from 50.9% last February. The same ports accounted for 52.7% of U.S. containerized export tonnage to the Far East this February, up from 52.0% in January but down sharply year-over-year from a 57.1% share.

Exhibit 3	February Year-to-Date Total TEUs (Loaded and Empty) Handled at Selected Ports		
	Feb 2021	Feb 2020	% Change
Los Angeles	1,634,832	1,350,181	21.1%
Long Beach	1,535,741	1,165,257	31.8%
NYNJ	1,346,404	1,196,148	12.6%
Georgia	850,411	742,076	14.6%
Vancouver	600,705	497,159	20.8%
Manzanillo	555,985	503,091	10.5%
NWSA	551,619	524,749	5.1%
Virginia	519,495	435,050	19.4%
Houston	453,802	524,247	-13.4%
South Carolina	398,533	408,234	-2.4%
Oakland	389,651	391,384	-0.4%
Montreal	263,328	263,251	0.0%
JaxPort	224,480	209,258	7.3%
Miami	206,159	189,528	8.8%
Lazaro Cardenas	186,576	208,355	-10.5%
Prince Rupert	173,640	181,828	-4.5%
Port Everglades	170,852	176,285	-3.1%
Maryland	166,626	169,402	-1.6%
Philadelphia	103,267	108,100	-4.5%
New Orleans	85,278	103,531	-17.6%
Boston	34,607	48,801	-29.1%
<b>US/Canada Total</b>	<b>9,683,496</b>	<b>8,684,469</b>	<b>11.5%</b>
<b>US Mainland Only</b>	<b>8,671,757</b>	<b>7,742,231</b>	<b>12.0%</b>

Source Individual Ports



## Deconstructing the February 2021 TEU Numbers *Continued*

**Exhibit 4** USWC Ports Shares of Worldwide U.S. Mainland, February 2021

	Feb 2021	Jan 2021	Feb 2020
<b>Shares of U.S. Mainland Ports Containerized Import Tonnage</b>			
LA/LB	28.4%	27.5%	23.4%
Oakland	3.8%	3.6%	3.8%
NWSA	3.7%	4.6%	4.5%
<b>Shares of U.S. Mainland Ports Containerized Import Value</b>			
LA/LB	35.5%	33.9%	30.5%
Oakland	3.6%	3.2%	3.4%
NWSA	4.9%	6.0%	6.2%
<b>Shares of U.S. Mainland Containerized Export Tonnage</b>			
LA/LB	19.5%	19.4%	19.6%
Oakland	6.6%	6.1%	6.6%
NWSA	6.6%	7.3%	7.4%
<b>Shares of U.S. Mainland Containerized Export Value</b>			
LA/LB	19.4%	18.6%	19.8%
Oakland	7.9%	6.8%	7.9%
NWSA	3.9%	4.3%	4.2%

Source: U.S. Commerce Department.

### Who's #1?

**The Port of Los Angeles was the nation's busiest container port in February 2021, having handled 799,315 total TEUs (loads and empties) that month.** The neighboring Port of Long Beach ran a close second with 771,735 more TEUs. Together, the San Pedro Bay complex managed to process 1,571,050 total TEUs in February. In third place came the Port of New York/New Jersey (PNYNJ) with 721,284 TEUs. Fourth place went to Savannah with 390,804 total TEUs. The NWSA Ports of Tacoma and Seattle ran fifth among the U.S. ports we track with a total of 285,382 TEUs in February.

For nitpickers who believe empty boxes shouldn't count, the rankings do not change. Los Angeles remained the

**Exhibit 5** USWC Ports Shares of U.S. Mainland Trade With East Asia, February 2021

	Feb 2021	Jan 2021	Feb 2020
<b>Shares of U.S. Mainland Ports' East Asian Container Import Tonnage</b>			
LA/LB	46.2%	43.3%	38.4%
Oakland	4.6%	3.9%	4.7%
NWSA	5.7%	6.8%	7.1%
<b>Shares of U.S. Mainland Ports' East Asian Container Import Value</b>			
LA/LB	52.0%	49.3%	45.9%
Oakland	4.3%	3.8%	4.3%
NWSA	7.0%	8.7%	9.3%
<b>Shares of U.S. Mainland Ports' East Asian Container Export Tonnage</b>			
LA/LB	32.2%	31.9%	34.0%
Oakland	8.4%	7.9%	10.1%
NWSA	10.5%	11.4%	12.7%
<b>Shares of U.S. Mainland Ports' East Asian Container Export Value</b>			
LA/LB	38.2%	37.6%	39.8%
Oakland	12.4%	11.6%	13.6%
NWSA	7.5%	8.1%	8.5%

Source: U.S. Commerce Department.

dominant gateway with 514,092 loaded TEUs crossing its docks in the year's second month. In second place with 493,172 loaded TEUs was the Port of Long Beach, easily ahead of PNYNJ's 428,874 total TEUs. Savannah was well behind with 300,722 laden TEUs.

In the category of inbound loads, Los Angeles (412,884 TEUs) exceeded Long Beach (379,756 TEUs) and PNYNJ (334,176 TEUs). Inbound loads at Savannah totaled 189,677 TEUs.

As for outbound loads in February, the most intriguing news is not that Savannah (111,045 TEUs) bested PNYNJ (94,698 TEUs), but that the Georgia port topped the Port of Los Angeles (101,208 TEUs), while falling shy of Long Beach (119,416 TEUs).



## Deconstructing the February 2021 TEU Numbers Continued

### China's Dimming Role in U.S. Containerized Imports

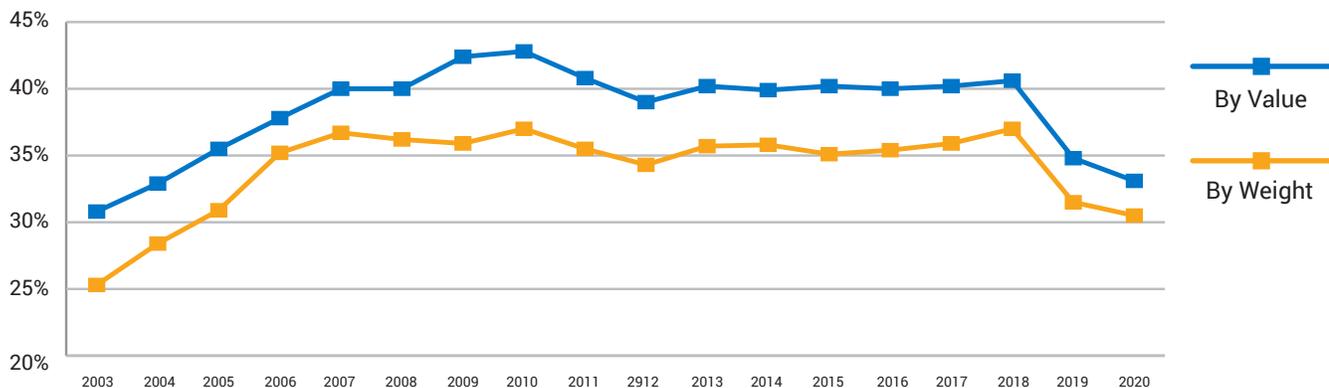
Amidst talk about formulating policies explicitly aimed at decoupling the American and Chinese economies, the increasingly fractious diplomatic relations between Washington and Beijing have also been taking a toll on bilateral trade links. As **Exhibit 6** attests, China's share of U.S. containerized imports in tonnage terms last year dropped to a level last seen in 2005, while its share of the value of those shipments declined to a level just a shade higher than in 2004. China remains the principal source of

the containerized cargos entering American ports, but the decline in its shares in the past couple of years has been precipitous. No improvement in the bilateral relationship appears imminent.

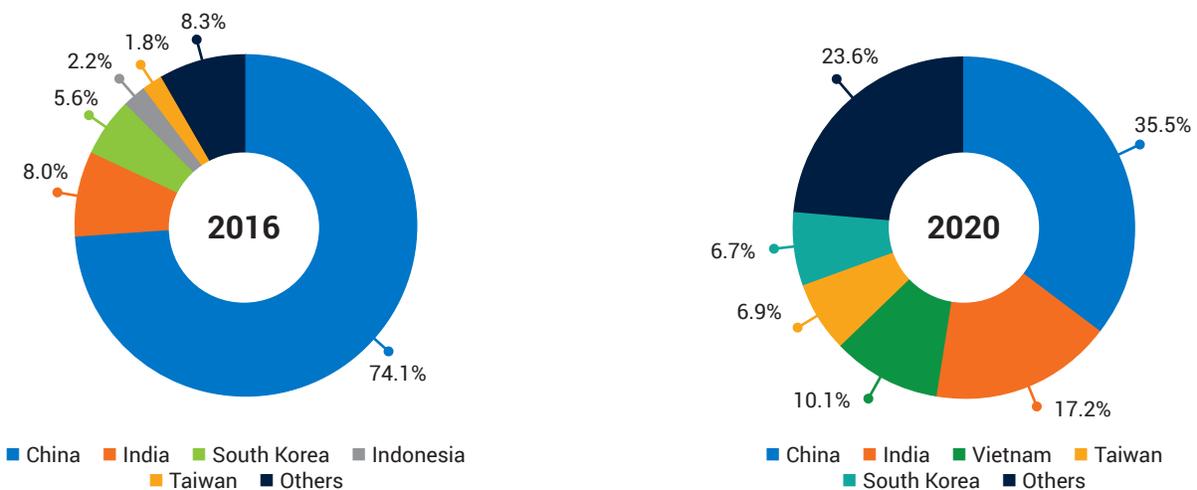
### Scraps of Paper

Not too long ago, China bought 74.1% of all of America's containerized exports of scrap paper. That would have been in 2016. But China decided to become more discriminating about the quality of scrap paper it would take off our hands. (That could happen when you've

**Exhibit 6** China's Share of U.S. Containerized Imports: 2002-2020  
Source: U.S. Commerce Department



**Exhibit 7** Global Markets for Containerized U.S. Scrap Paper Exports  
Source: U.S. Commerce Department





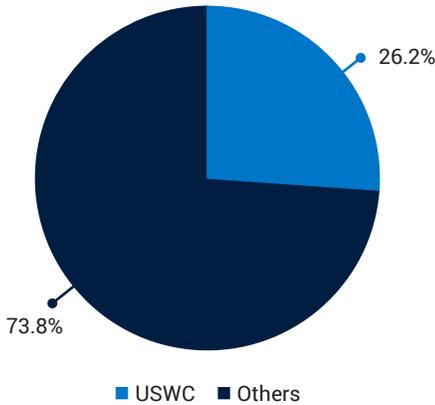
Deconstructing the February 2021 TEU Numbers *Continued*

Exhibit 8

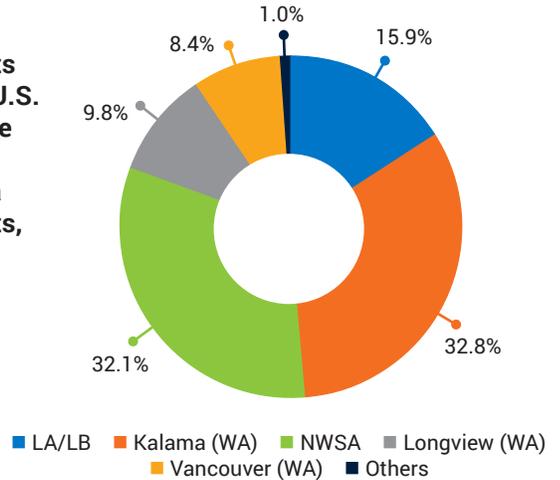
U.S. Soybean Export Ports, 2020

Source: U.S. Commerce Department

USWC Combined Share of U.S. Oceanborne Soybean Exports by Tonnage, 2020



USWC Ports Shares of U.S. Oceanborne Soybean Exports via USWC Ports, 2020



opened one too many containers stacked tightly with used pizza boxes with pizza remains still attached.) And then there's been all that back-and-forth between Beijing and Washington that hasn't much helped matters.

In any event, by February of this year, China's share of our containerized scrap paper exports had plummeted to 5.6%, which was actually an improvement over its 3.6% share in January and 3.3% share in December.

Nevertheless, total U.S. scrap paper export tonnage worldwide in February was down less than one percent from a year earlier. How'd that happen?

What happened was that scrap paper shippers got resourceful and found alternate markets. So who has stepped up? India, mainly, although Vietnam, Thailand, Malaysia, Singapore, and Ecuador have all become more enthusiastic importers of our previously used paper products.

Port-wise, the Port of Los Angeles and Long Beach have handled about one-third of all scrap paper exports in recent years. Last year, their share was 32.6%. Not surprisingly, the number two gateway last year was the Port of New York/New Jersey with a 23.4% share, followed by the Port of Oakland (16.6%). Owing largely to India's overtaking of China as the principal destination overseas of American scrap paper, San Pedro Bay's share

of the trade dwindled from 31.7% in February 2020 to 27.8% this February, while PNYNJ's share edged up from 23.8% to 25.1%. Oakland's share meanwhile slipped from 16.8% to 12.9%.

A Few Words and Numbers about U.S. Soybean Exports

For the record, fully 91.1% of the 60.28 million metric tons of U.S. soybean exports that were shipped from American ports last year were not containerized. Also, let the record show that 25.9% more soybeans were exported in 2020 than in 2019. Finally, the record should further indicate that soybean exports in the first two months of this year were up by 70.9% from the same months a year ago and by 47.0% from the first two months of 2019. Most would likely consider this to be a thriving trade.

Fans of U.S. West Coast ports might like to know that, in terms of sheer tonnage, America's Pacific Coast seaports and riverports handled 26.2% of all seaborne exports of U.S. soybeans last year, as the left half of Exhibit 8 reveals. That has been a fairly average share in recent years, down from 30.0% in 2019 but up from 24.4% in 2018.

The right half of Exhibit 8 shows how USWC ports divvied up the 15.76 million metric tons of soybeans that were shipped through USWC ports last year. Foreign journalists



## Deconstructing the February 2021 TEU Numbers [Continued](#)

(i.e., East Coast reporters) may be shocked to learn that the Big Dog here is not the sprawling Southern California Ports of Long Beach and Los Angeles but rather the Columbia River Port of Kalama, whose 32.8% share the USWC soybean export trade edged out the 32.1% combined share held by the Northwest Seaport Alliance Ports of Tacoma and Seattle. The 15.9% share of the tonnage that moved through the Ports of Long Beach and

Los Angeles was higher than the individual shares that sailed from two other Washington State ports, Longview (9.8%) and Vancouver (8.4%). But the three ports on the Washington State side of the Columbia River that separates Washington and Oregon collectively handled 51.0% of the USWC soybean export trade last year, or 13.4% of all U.S. seaborne soybean exports in 2020.

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## Jock O'Connell's Commentary: A Brisk Trade in Sour Grapes and Bromides

There continues to be a surfeit of sorrowful stories in the media about exporters of agricultural goods allegedly being denied access to either shipping containers or space aboard outbound vessels. So disposed are certain journalists to take the side of bedraggled farm exporters that even the customary disclaimer "allegedly" is commonly dropped from the charges being hurled against a presumed cabal of steamship lines and terminal operators.

More and more, this is coming to resemble one of those macro versus micro editorial trade-offs, in which the news value of a single harrowing accident is infinitely higher than an account of all the accidents that did not happen.

But in truth not a year passes when someone's load of apples or oranges or grapes simply misses the boat. It's just that in most years there's not a concerted effort by a farm industry lobby to pile up scattered anecdotes of woeful outcomes until bad luck or bad planning or hiring your brother-in-law as your freight-forwarder becomes grist for a federal issue.

The simple fact is that, notwithstanding the few folks currently lurching about the public policy stage, chewing on the scenery while displaying a remarkable waywardness with numbers, there is an abundant harvest

of positive agricultural trade news that's getting the Rodney Dangerfield treatment from headline-seeking editors.

Anyway, here are some numbers worth recalling the next time you see a headline screaming: "The big export backlog: US ag products stack up at Western ports."

Tree nuts are a huge business here in California, the nation's top farm state (in terms of gross farm receipts) and America's top agricultural exporting state (with as many exports by dollar value as the next two biggest farm exporting states combined). Almonds, pistachios, and walnuts rank among the state's top five agricultural exports in value. (Dairy products and wine are the others.)

So what's been happening with nut exports these past few months when farm exports have reportedly been "stacking up" at the ports and ocean carriers have been "strangling" farm exports.

Foreign shipments of almonds, California's most valuable farm export commodity, have not exactly been struggling in the current crop year, which began last August. Through March, almond growers shipped 723,476 tons of nuts abroad, up a righteous 23.8% over the 584,539 tons exported during the preceding crop year. For those likely to suggest that the previous year might have been an



## Commentary Continued

off year, let the record (provided by the California Almond Board) show that exports during the 2019-2020 crop year were 6.1% higher than in the one before.

Pistachio exports have likewise been ascendant in their current crop year, which began last September, to 139,102 tons from 121,728 tons in the preceding crop year. In this case, a year-over-year comparison may not be entirely fair. For starters, the 2019/2020 crop year was an off-year harvest, and the COVID-19 virus staggered China, the top export market for U.S. pistachios, less than halfway through the crop year. Still, apart from an unusually robust 2018/2019 year, current year pistachio exports are running higher than in any preceding year.

Walnuts are California's fifth most valuable farm export, and export tonnage is on a pace to top any previous year. Somehow, walnut exporters managed to find enough containers to ship 80,428 more tons this crop year than last, despite having all the stars allegedly lined up against them.

Nuts are one thing. But nothing seems to rile up the out-of-town media more than soybeans traveling in containers. This obsession is a bit hard to figure out. As this newsletter has persistently pointed out, less than 10% of America's soybean exports move in containers. Still, I'm happy to report that, year-over-year, overall soybean export

tonnage has been up 84.5% in the six months from last September through this February, when the press was rife with stories of chaos on the docks. And, despite the fact that containerized soybean export tonnage over the past six months has been up 56.6% over the same period last year, reporters commenting on the soybean trade often sound as though they've been hired on as keeners at an old-fashioned Irish wake.

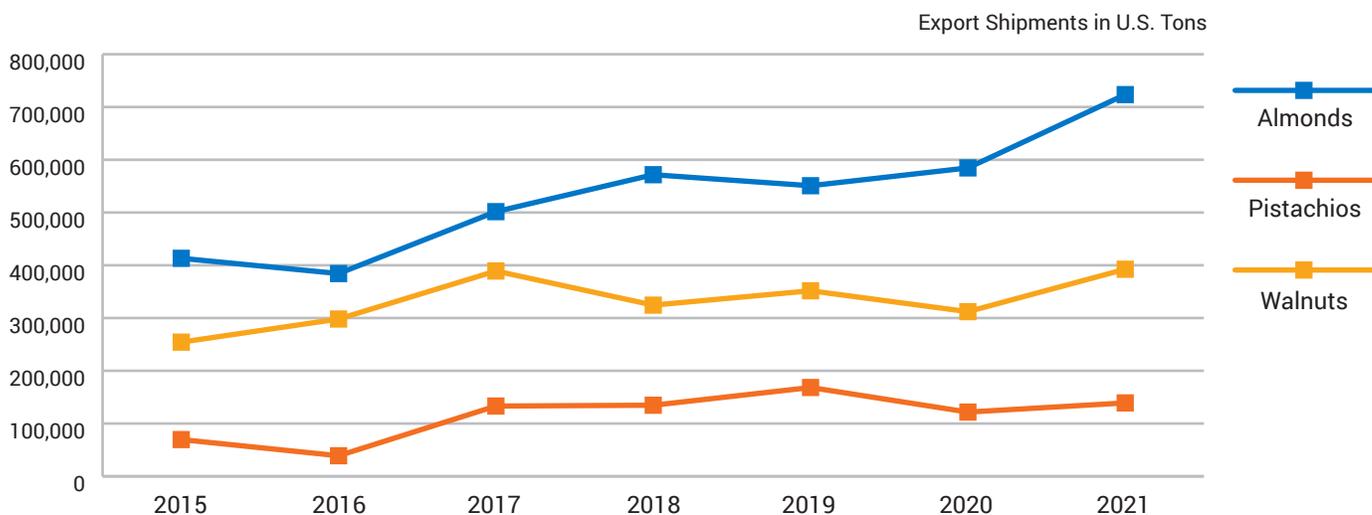
Admittedly, not every farm exporter is having a good year. Word out of the Pacific Northwest is that apple exports have been way down. Washington State exported 18.8 million 18-kilogram boxes of apples in the 2020-21 crop as of the end of March. That is down 20.5% from this time last year and down 16.4% compared to the 2018-19 shipping season, according to data from the Washington Apple Commission. Those would be the lowest export numbers since the 2003-04 crop season, when they were down 21.7%, as the *Yakima Herald-Republic* has reported.

The alleged reason for the export shortfall, as some kvetchers spin the yarn, is that apple shipments abroad are being throttled by shipping lines unwilling to accept containers of their produce.

There is another narrative, however. As an April 5 report in the *Seattle Times* notes: "In 2018, then-President Donald Trump imposed tariffs on steel and aluminum from

### Exhibit A California Tree Nuts Exports: Crop Years Through March of Each Year

Source: Almond Board of California, California Walnuts Board, Administrative Committee for Pistachios





## Commentary Continued

several countries, including Canada, Mexico and China. Several countries then imposed retaliatory tariffs on U.S. products, including apples and cherries in Washington State.”

While U.S. trade officials have since resolved the disputes with some countries – including Canada and Mexico – they have not with others. In 2019, India imposed an additional 20% tariff on apples, which brought the total duty to 70%. The Washington state apple industry had relied heavily on India as a destination for Red Delicious apples. Likewise, apples and cherries to China now face a 50% tariff. Just four years ago, Washington State growers shipped 3.3 million 20-pound boxes of cherries to China. Since the tariffs were implemented in 2018, shipments have declined to 2.2 million in 2018, 1.9 million in 2019, and to just over 1 million last year.

The Washington Apple Commission also takes note of a more natural cause for reduced exports: a smaller crop. In early August, the first estimate for the state’s apple crop predicted a crop volume of 134 million boxes, on par with the previous season of 133 million boxes. But, over the Labor Day weekend, “a strong windstorm” resulted in apples being knocked off the tree and some growers sustaining damage to their “trellis systems.” At about the same time, wildfires burning in Washington and other West Coast states delayed harvesting and affected fruit quality. Expectations are now for a 5%-10% reduction in crop volume as a result of the adverse climate events.

But enough about farm exports. Let’s talk imports. For in addition to all of the other calamities facing supply chains, this season is yielding an especially ripe crop of bromides and nostrums intended to enhance the efficiency of America’s seaports and avoid future bottlenecks.

Clearly, the ports are congested by an unprecedented surge of imports which most think has something to do with the plague. Maybe because we couldn’t or didn’t want to expose ourselves to a lethal virus by going out to restaurants or bars or movies or stage plays or ball games, we’ve been cloistered at home spending way too much time perusing the offerings of Amazon.com or the L.L Bean catalog. Too often, we’re buying things we don’t really need but are simply too bored not to order. And the

decision to hand out \$1400 to most everyone to spend on products that will likely have to be sourced from Asia won’t help alleviate the crush at the ports. Still, everyone likes receiving presents, and the pandemic has been giving us the opportunity to celebrate Christmas every day. (Although some issues could eventually arise: Daddy, why does Santa wear a brown UPS shirt?)

Anyway, we’ve got ports that are currently in worse condition than Fibber McGee’s closet. (Younger readers might want to think of the waiting areas at the DMV.) What, then, to do?

One bit of wisdom may be to not assume the current crisis constitutes a new normal. Clearly, while it’s not at all clear how long the current levels of congestion will last, it is clear that the Port of Los Angeles will not be seeing a half million inbound loaded TEUs continue to show up every month. Are we clear on this? Taxpayers?

Still, some pundits have decided it’s time to resurrect the notion that U.S. ports, like ports in China, should operate on a 24/7/365 basis. Apart from implicitly recommending we let the Chinese dictate American working conditions at ports such as Los Angeles and Long Beach, the proposal fails to address who pays for a third shift. Importers? Farm exporters?

The 24/7/365 gambit also focuses too narrowly on the ports. Other elements of the supply chains would have to buy in to make such a scheme work. Even if (very tall order) port authorities, labor unions, and terminal operators all agreed to stay open all the time, would truckers show up at 2am? Would warehouses staff up to handle higher volumes of deliveries at 4am?

The “hoot owl” shift can be very lonely down on the waterfront.

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



# Shipwrecked

By John McLaurin, President,  
Pacific Merchant Shipping Association

The Long Beach City Council is considering the transfer of Pier H, which includes the ill-fated Queen Mary, to the Long Beach Harbor Department.

Operation of the Queen Mary has passed through multiple organizations over the years, resulting in decades of disappointment, bankruptcies, and failure.

According to a 2017 Marine Survey of the vessel/hotel, the Queen Mary needed approximately \$289 million dollars for repairs. The report stated that **“...at this rate of corrosion some internal collapse of the Queen Mary’s structure will occur within 10 years unless major action is taken soon.”**

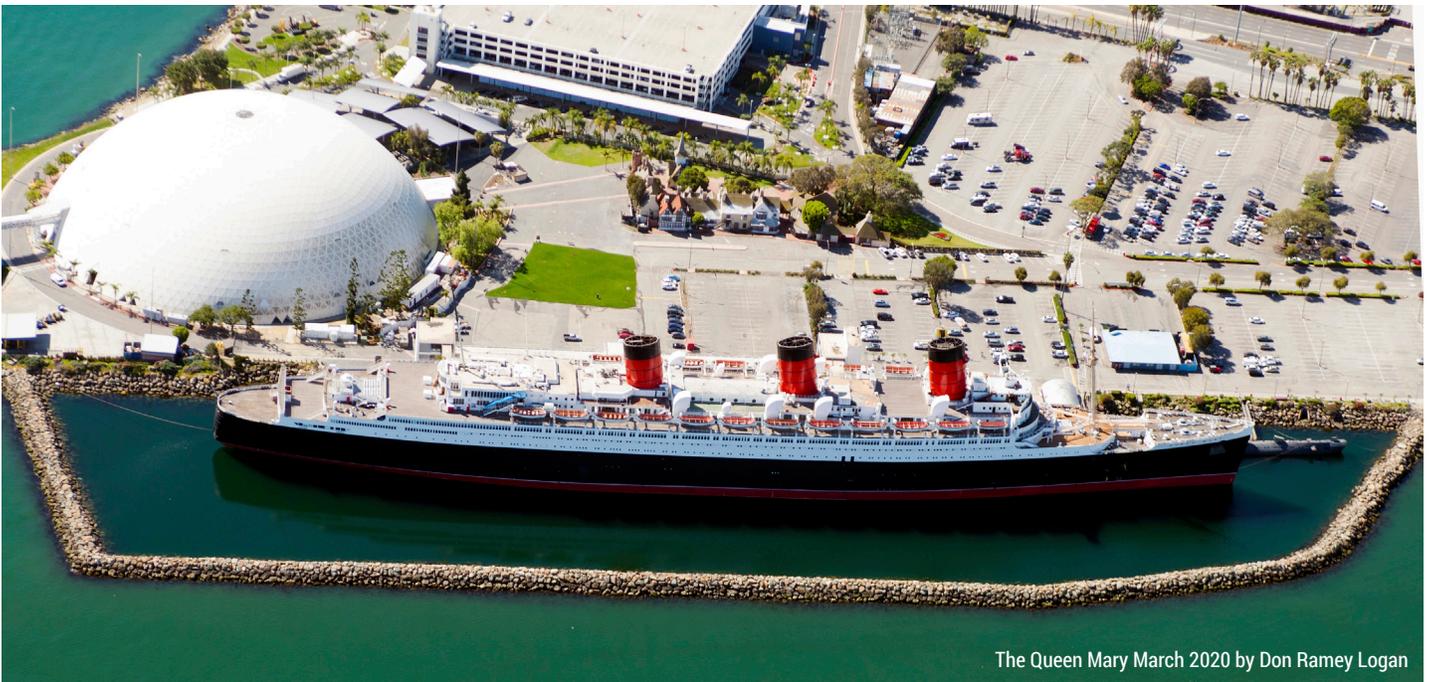
Little has been done to the vessel/hotel complex since that report was written. In fact, in court filings by the City of Long Beach filed on April 9th, 2021, a declaration by the City’s own expert called the 2017 Marine Survey “comprehensive” and stated **“Those issues noted as urgent in 2017 are more urgent now with the passage of time.”**

Ironically, the City of Long Beach requested the transfer of the Queen Mary and associated property from the Port of

Long Beach in 1992. Since that time, the Queen Mary has been an albatross around the City’s neck. In the 30 years since the transfer there have been several bankruptcies by various operators of the vessel/hotel (latest bankruptcy filed this year) and multiple and critical city audits (one currently underway in which a March 31st press release by the City Auditor complained that the operator of the Queen Mary had not provided documentation of \$23 million in repairs – money that was provided by the City).

Instead of debating whether to transfer responsibility of the Queen Mary from the City to the Port of Long Beach, there should be an honest discussion about the viability of the vessel as a hotel and tourist attraction. The preceding decades of failure should guide the discussions.

The Disney Corporation smartly walked away from the Queen Mary in the early 1990’s. A 2017 newspaper story on the structural problems of the vessel had the following quote from former Mayor Kell following the departure of Disney, **“Former Mayor Ernie Kell at the time called the ship a “tombstone in a cemetery no one wants to visit,” and said**



The Queen Mary March 2020 by Don Ramey Logan



## Shipwrecked *Continued*

***keeping it would saddle taxpayers with debt for decades.***  
Mayor Kell's statement is still valid thirty years later.

Unsaid in the brief and rushed debate is how the transfer of the Queen Mary to the Port will have a negative impact on the Port finances. The Port of Long Beach is facing billions in infrastructure costs going forward from the Pier B railyard along with installing the infrastructure necessary to support the transition to zero emissions under both port and state policy directives. If the Queen Mary needed \$289 million in repairs six years ago, one can assume that figure is much higher today. There are other questions as well including liability and potential environmental mitigation/cleanup that will be needed to be done whether it continues to be operated as a hotel or it is decided that a more

practical and appropriate course would be to dispose of the ship. In addition, while the Port of Long Beach has talented staff with regard to the demands of international trade, they do not have expertise or the personnel experienced in running hotels and tourist attractions.

If the City of Long Beach appreciates the competitive environment that the Port of Long Beach has to navigate in, it will not saddle the Port with the constant headache and financial burden of the Queen Mary. It is time for a discussion that may be brutal for some, but which is long overdue. The costs and liabilities involving the Queen Mary require a thorough, independent, and transparent process.

Don't allow the Queen Mary to sink the Port of Long Beach.



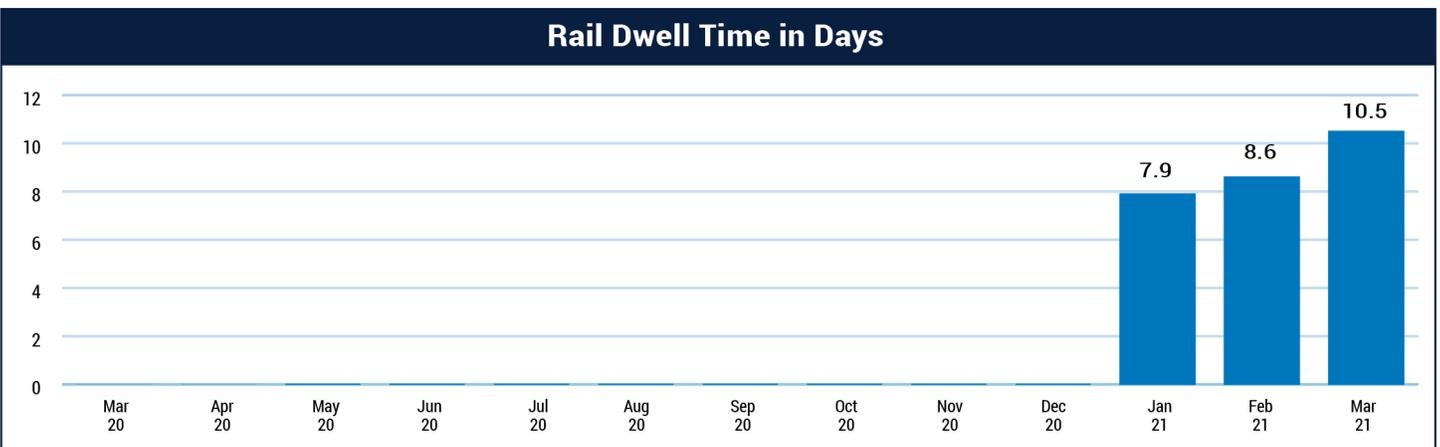
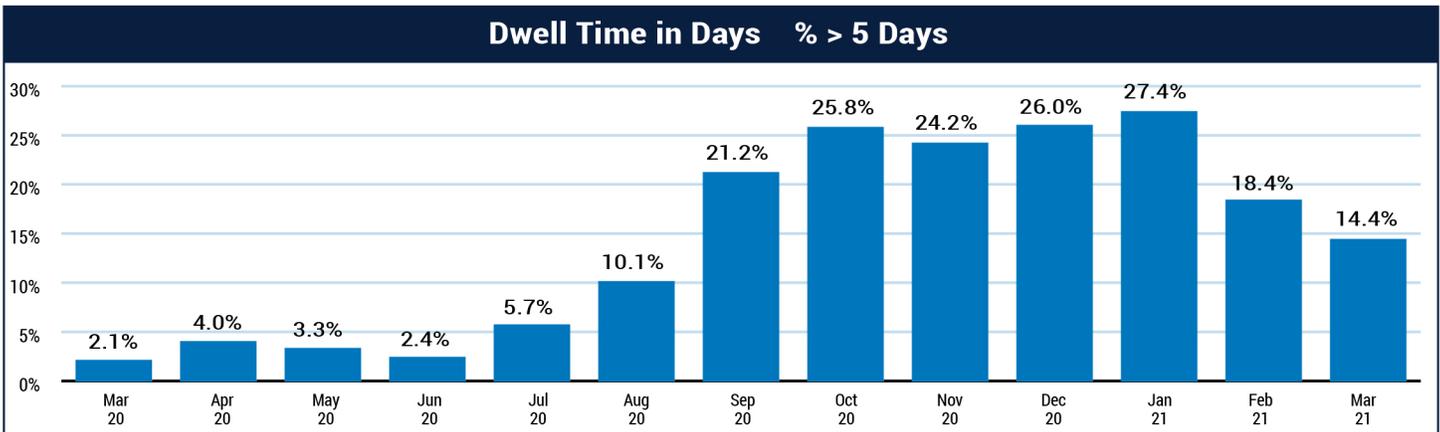
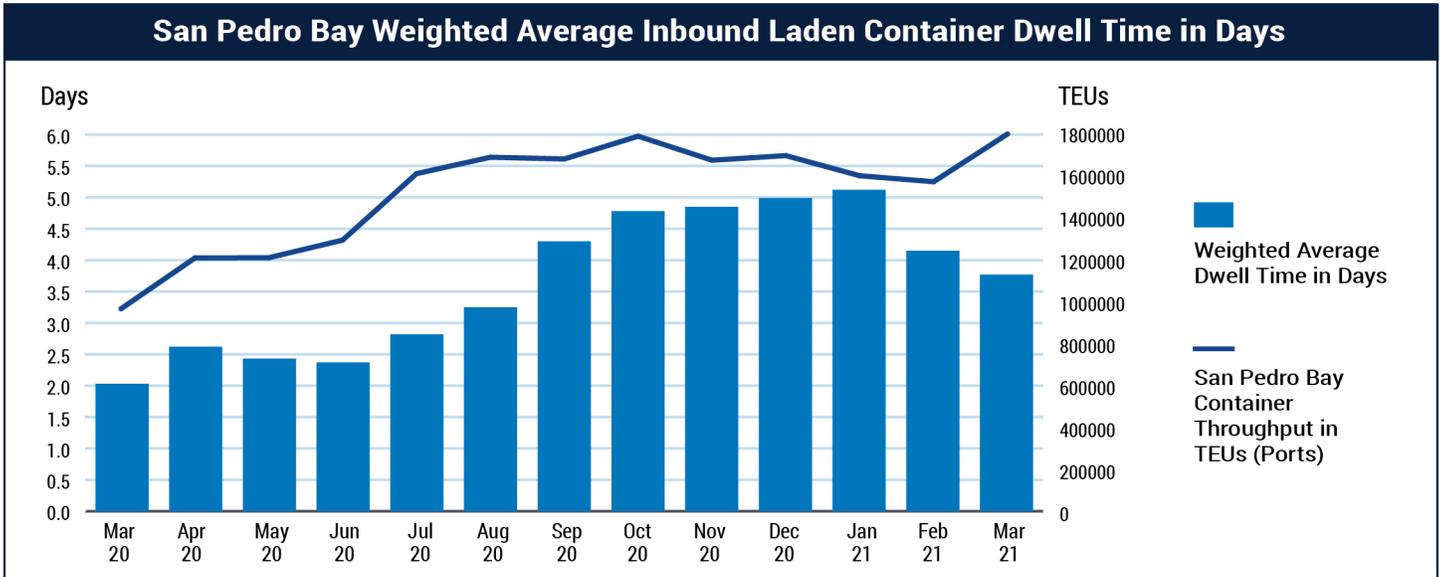
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## Import Dwell Time Is Down For March; Rail Dwell Time Is Up



# WA State Board of Pilotage Commissioners

Industry Update: May 25, 2021 BPC Meeting

## Vessel Arrivals

*YTD Through First Four Months*

- ✚ Overall arrivals **down 22**
- ✚ Containers **down 11** (but slightly up in April to April comparison as expected)
- ✚ Bulkers **up 29** (up 12 in April)
- ✚ Car Carriers **up 2** (up 12 in April – had not tracked this sector closely; big increase)
- ✚ Tankers/ATB's **down 53** (down another 15 in April)

## Container Vessels at Anchor or Drifting – Supply Chain Disruptions

- ✓ As significant number of container vessels are still at anchor off of LA/LB or at anchor or drifting off the Bay Area totaling near 50 between the two gateways as of this submission (week before meeting). LA/LB is now less than half the container vessels at anchor compared to the peak (40 at anchor) and the time at anchor waiting is ticking downward.
- ✓ Worth Repeating: Eastbound rail capacity limitations, containers out of service sitting at anchor, increase in transloading leaving increasing numbers of 20's and 40's near port instead of points East, temporary off terminal loaded container storage in LA/LB and other efforts being made to address the backlog – PMSA put out a video summarizing things that terminal operators were doing.
- ✓ PNW gateway has had a few issues but continues to avoid the kind of back up being experienced in the California ports; a couple of container vessels on anchor from day to day, some of which are outbound to Vancouver. The wait an anchorages used for inbound vessels is significantly shorter than in LA/LB.
- ✓ New container weekly services are showing up in the arrival numbers now.

## Cruise Season?

- ✚ With the recent announcement that Congress is moving forward with the exemption from the Passenger Services Act, there is potential of salvaging some cruise season.
- ✚ If the cards line up, we might see some cruise activity near the end of July or early August. This is all very fluid (as of the time of this writing) but we expect follow on announcements on this issue in the next few weeks.

## Carriers maintain interest in NWSA with fourth new service

[Bill Mongelluzzo, Senior Editor JOC](#) | Apr 28, 2021 2:09PM EDT

The Northwest Seaport Alliance next month will welcome the fourth new trans-Pacific service to call in Seattle-Tacoma this year, and others could follow as carriers continue to make good on their pledge to relieve pressure on the congested ports of Los Angeles and Long Beach. “Absolutely, interest in our gateway is still strong from both carriers and BCOs [beneficial cargo owners],” Tong Zhu, chief commercial officer and chief strategy officer of the NWSA, told JOC.com Tuesday. Port staff continue to field inquiries from other carriers exploring the possibility of initiating service to the Pacific Northwest, she said.

Mediterranean Shipping Co. (MSC) last fall launched its [weekly Santana service linking North Asia with Los Angeles-Long Beach](#) with 9,000 TEU ships. MSC announced at the weekend the Santana service will no longer call in Southern California, and its new port rotation will be Yantian-Shanghai-Tacoma-Yantian. The MSC announcement did not state the size of the vessels in the new PNW service. Zhu said MSC in recent months has deployed several extra-loader vessels to Seattle-Tacoma and is pleased with the ability of the gateway to handle the cargo. The ad hoc vessels carried containers for local delivery as well as inland point intermodal (IPI) containers that move to the upper Midwest, she said. At first, the NWSA experienced some issues securing enough [railcars and locomotive power to handle the increased IPI volume](#), but the situation has improved and last week the port was allocated additional rail capacity, Zhu said.

MSC follows [CMA CGM, Zim Integrated Shipping Services, and Wan Hai Lines](#) in initiating services to Seattle-Tacoma so far this year. Zim this week will launch a [weekly trans-Pacific service to Oakland](#), following CMA CGM, which in January launched a first-call inbound service to the Northern California port.

### Imports remain strong in LA-LB, Seattle-Tacoma

## U.S. West Coast Ports Race to Clear Ship Backlog by Peak Season

By [Brendan Murray \(Bloomberg\)](#) May 17, 2021

Ship congestion outside the busiest U.S. gateway for trade with Asia showed glimmers of easing as port officials race to clear a backlog of arriving cargo before peak season begins in about three months. A total of 19 container ships were anchored waiting for entry into Los Angeles and Long Beach, California, as of Sunday, compared with 21 a week earlier, according to officials who monitor marine traffic in San Pedro Bay. The bottleneck has persisted since November, peaking around 40 vessels in early February. Another 18 container carriers are scheduled to arrive over the next three days, with nine of those expected to drop anchor and join the queue. The average wait for berth space was 6.1 days, compared with 6.6 a week ago, according to the L.A. port. That number had peaked around 8 days in April. The Port of Long Beach said last week volume was [the strongest-ever](#) for any April, the 10th consecutive monthly high.

## Oakland, NWSA ports fluid despite heavy LA-LB diversions

[Bill Mongelluzzo, Senior Editor](#) | Apr 23, 2021 11:37AM EDT

Cargo owners who are diverting a portion of their shipments to the ports of Oakland and Seattle-Tacoma to avoid congestion in Los Angeles and Long Beach are experiencing some delays, with vessel bunching in Oakland being the major issue, but the gateways remain fluid, according to port executives. These developments indicate that carriers' attempts in recent months to [relieve pressure on the Southern California gateway](#) through new services and extra-loader vessels have not overwhelmed Oakland or the Northwest Seaport Alliance (NWSA) of Seattle and Tacoma, which has prompted importers of Asian-made goods to ship more through those ports.

US imports from Asia through Oakland jumped 18.7 percent in March compared with February and were 73.5 percent higher than in March 2020, according to PIERS, a JOC.com sister product within IHS Markit. At the NWSA, imports from Asia surged 69.8 percent from February and 66.1 percent year over year in March.

### NWSA relatively trouble-free

Despite handling 30 ad-hoc vessel calls so far this year, the NWSA ports have experienced only sporadic incidents of vessels being unable to move directly to berth upon arrival, and the time spent at anchor has generally been less than 24 hours, said Michael Reilly, the port's director of intermodal business development. A spokeswoman for the NWSA said there was just one container vessel waiting at anchor on Wednesday that moved to berth at Terminal 18 Thursday morning.

## PUGET SOUND PILOTAGE DISTRICT ACTIVITY REPORT

**Apr-2021**

The Board of Pilotage Commissioners (BPC) requests the following information be provided to the BPC staff no

Activity						
Total pilotage assignments:	534	Cancellations:	17			
Total ship moves:	517	Cont'r:	206	Tanker:	123	Genl/Bulk: 121 Other: 67
Assignments delayed due to unavailable rested pilc	2	Total delay time:	1.25			
2 pilot jobs:	30	Reason:	PSP GUIDELINES FOR RESTRICTED WATERWAYS			
Day of week & date of highest number of assignme	Thu	15-Apr	26			
Day of week & date of lowest number of assignme	Mon	26-Apr	6			
Total number of pilot repositic	100	Upgrade trips	12	YTD	52	
3 consecutive night assignmen	27	YTD	105			

### Callback Days/Comp Days

	Starting Total	Call Backs (+)	Used (-)	Burned (-)	Ending Total
Licensed	2312	52	39		2325
Unlicensed	661			50	611
Total	2973	52	39		2936

### 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
6-Apr	6-Apr	Seattle	PMI	BPC EXAM	BOZ, EME, HUP, KEP, MCN, MYE, SID
7-Apr	7-Apr	Seattle	PMI	BPC EXAM	ANT, SCR
11-Apr	12-Apr	Seattle	PMI	BPC EXAM	GRK, SCR
13-Apr	13-Apr	Seattle	PMI	BPC EXAM	SCR
14-Apr	14-Apr	Seattle	PMI	BPC EXAM	GRK, SCR
15-Apr	17-Apr	Seattle	PMI	BPC EXAM	SCR

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

Start Dt	End Dt	City	Group	Meeting Description	Pilot Attendees
1-Apr	1-Apr	Seattle	PSP	First Class Pilotage Quals	COL
6-Apr	6-Apr	Seattle	PSP	BC Coast Pilots	COL
6-Apr	6-Apr	Seattle	PSP	UTC	MOT, VON
7-Apr	7-Apr	Auburn	PSP	HUN-Funeral Representation	KLA
7-Apr	7-Apr	Seattle	BPC	BPC	COL
8-Apr	8-Apr	Seattle	PSP	Administrative	KLA
8-Apr	8-Apr	Seattle	PSP	BC-PPA	COL
13-Apr	13-Apr	Seattle	PSP	BOD	ANA, COL, GRD, GRK, KLA, NEW
13-Apr	13-Apr	Everett	PSP	Port of Everett Outreach	VON
19-Apr	19-Apr	Seattle	BPC	BPC	ANT, BEN, SCR

19-Apr	19-Apr	Seattle	PSP	NW Women in boating	BEN
20-Apr	20-Apr	Seattle	USCG	VTS	BOU
23-Apr	23-Apr	Seattle	PSP	First Class Pilotage Quals	BEN, COL
24-Apr	24-Apr	Port Town	PSP	Radio outreach	BEN
27-Apr	27-Apr	Seattle	PSP	Transportation	ANA, BEN, KLA, SEM, SEY
28-Apr	28-Apr	Seattle	PSP	First Class Pilotage Quals	BEN, COL
30-Apr	30-Apr	Seattle	PSP	First Class Pilotage Quals	BEN, COL

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

Start Dt	End Dt	REASON	PILOT
1-Apr	13-Apr	Not fit for	BUJ
1-Apr	5-Apr	ETO	ANA, CAW, KAL, KEA
13-Apr	19-Apr	ETO	EME, HEN, JEN, ROU, SEY
27-Apr	30-Apr	ETO	ANT, MCG, MOT
29-Apr	30-Apr	ETO	KNU

**Presentations**

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

- ⌚ *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.*

**Other Information** (Any other information requested or intended to be provided to the BPC)

# Office of Equity

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## *What's Next?! Briefing Session*

Karen A. Johnson, PhD | she.her.hers  
Director, Office of Equity

— OFFICE OF GOVERNOR JAY INSLEE —



# Office of Equity

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*Why, What, How & What's Next?!*

Karen A. Johnson, PhD | she.her.hers  
Director, Office of Equity

— OFFICE OF GOVERNOR JAY INSLEE —





— OFFICE OF GOVERNOR JAY INSLEE —



*equity & justice for all*



# The Office of Equity

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## *Why – The Legislature finds that...*

- the population of Washington state has become increasingly diverse over the last several decades.
- as the demographics of our state change, historically and currently marginalized communities still do not have the same opportunities to meet parity as their nonmarginalized counterparts across nearly every measure including education, poverty, employment, health, and more.
- Inequities based on race, ethnicity, gender, and other characteristics continue to be deep, pervasive, and persistent, and they come at a great economic and social cost.

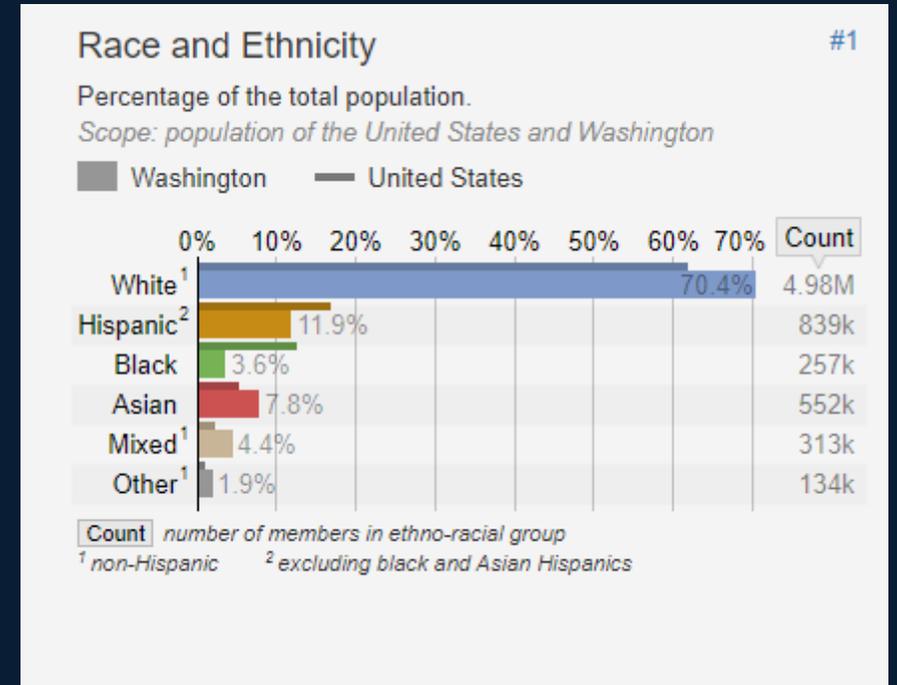


# Race and Ethnicity in Washington (State)

7,656,200

- The April 1, 2020, population estimate places Washington's population at 7,656,200.
- This represents an increase of 109,790, or 1.45%, since last year.

Source: Google, Oct 27, 2020



# The Office of Equity

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# Student Succeeds Act long-term goals.

Table 1: shows the four-year graduation rates for the class of 2018.

4-Yr Cohort Grad Rate	Actual C/O 2017	Actual C/O 2018	C/O 2018 Target	Statewide Indicators Target
<b>All Students</b>	<b>79.3</b>	<b>80.9</b>	<b>80.4</b>	Exceeds annual target
Black / African American	71.5	74.4	73.4	Exceeds annual target
Amer. Indian / Alaskan Native	60.3	60.4	63.3	Did not meet annual target
Asian	87.5	90.0	87.7	Exceeds annual target
Hispanic / Latino	72.7	75.2	74.4	Exceeds annual target
Hawaiian / Pacific Islander	68.1	74.0	70.3	Exceeds annual target
White	81.9	82.9	82.7	Exceeds annual target
Two or More Races	79.7	80.7	80.8	Did not meet annual target
Students with a Disability	59.4	61.7	62.4	Did not meet annual target
Limited English	57.8	64.1	61.0	Exceeds annual target
Low-Income	70.0	72.1	72.0	Exceeds annual target

Source: State Board of Education Class of 2018 Graduation Rate report prepared for the March 2019 Board meeting



# Poverty Rate in Washington State

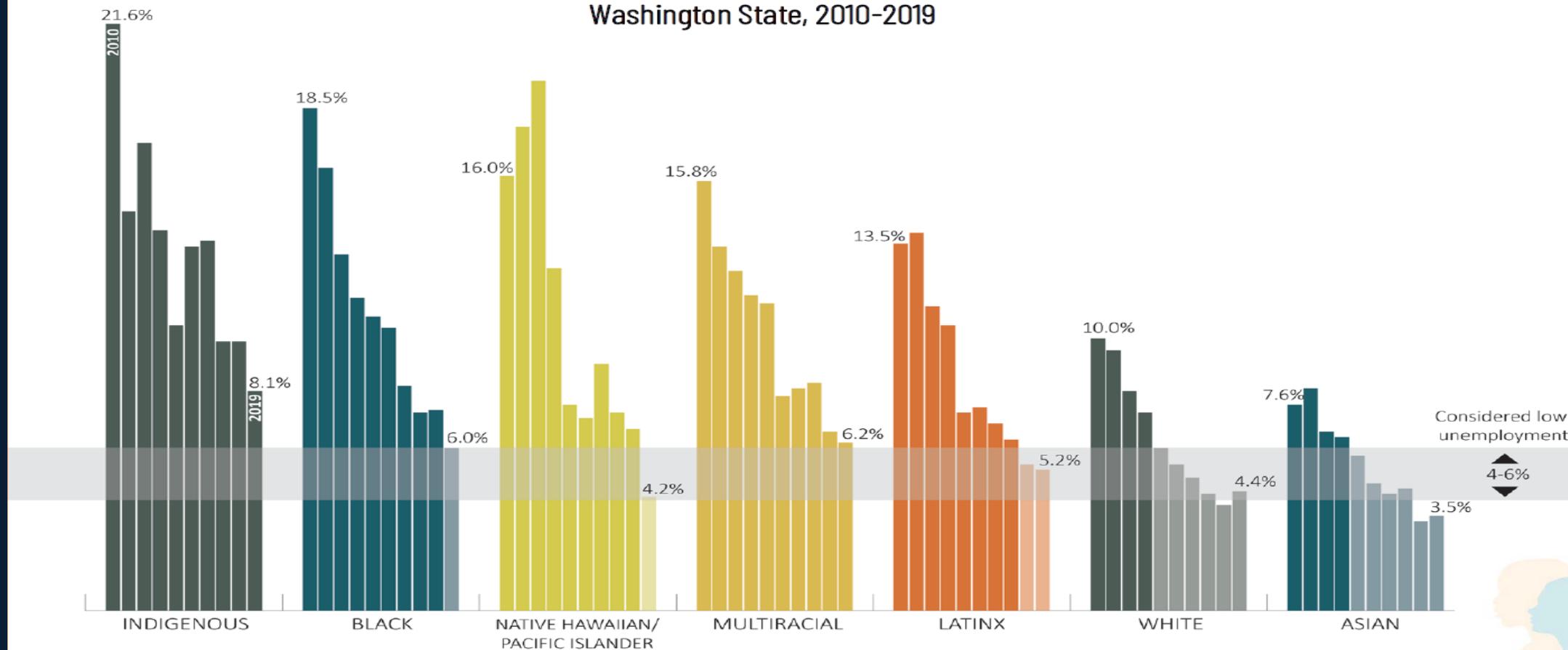
RACE & ETHNICITY				
African American	Asian American	Latino	Native American	White
16.3%	7.9%	16.0%	21.0%	8.2%

Center for American progress: <https://talkpoverty.org/state-year-report/washington-2020-report/>, Washington 2020



# Unemployment Rate by Race

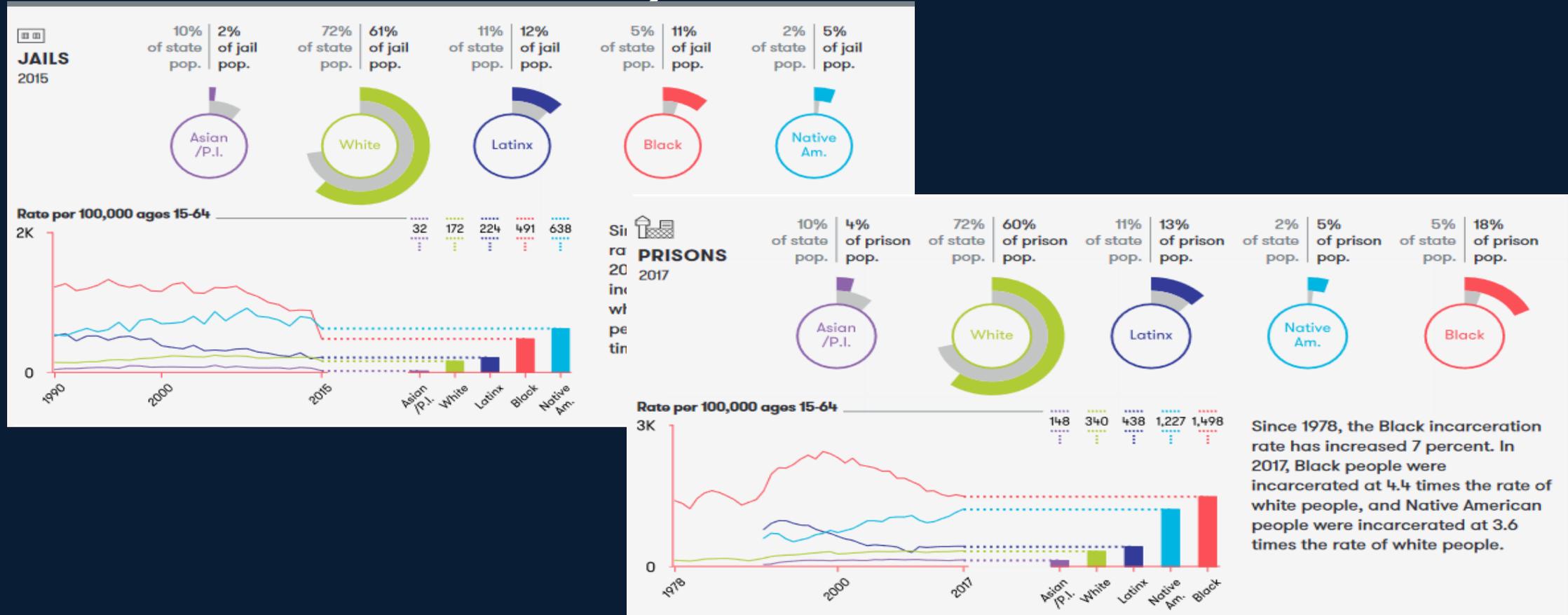
## Unemployment Rate by Race Washington State, 2010-2019



Source: American Community Survey 1-Year Data, 2010-2019



# Race and Ethnicity in Jails and Prisons



Source: Vera Institute of Justice – Incarceration Trends in Washington:  
<https://www.vera.org/downloads/pdfdownloads/state-incarceration-trends-washington.pdf>Race



# The Office of Equity

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## *Why*

- **VISION:** Everyone in WA has full access to the opportunities, power, and resources they need to flourish and achieve their full potential.
- **MISSION:** Promote access to equitable opportunities and resources that reduce disparities and improve outcomes statewide across state government.



# Office of Equity

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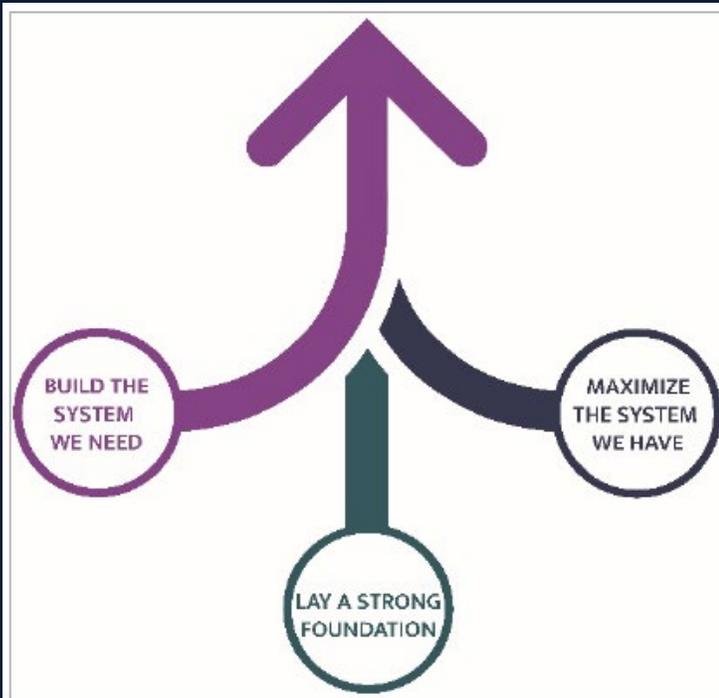
## *What*

- Develop the state's five-year equity plan
- Help the state develop language-access requirements
- Remove barriers to accessing state services
- Decrease inequities across state government
- Help agencies develop their own Diversity, Equity & Inclusion (DEI) plans
- Promote systemic and cultural changes by introducing best practices & change management to agencies
- Design online performance dashboard that measures agencies' progress toward equity goals



# The Office of Equity

## How



**Lay a strong foundation.** Center equity in all of our operations, programs, and interactions.

**Maximize the system we have.** Through stronger policy, integration, and collaboration across systems, sectors, and jurisdictions to make the most of the system we have.

**Build the system we need.** Begin to dismantle racism by addressing root causes through bold systemic and cultural change.

Blueprint for a Just & Equitable Future: 10-Year Plan to Dismantle Poverty in Washington, p. 50



# The Office of Equity

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## What's Next?!





# Questions





# May BPC Update: Vessel Trend Synopsis

## Routes for vessels newly under escort requirement

# Background Information

## ESHB 1578

CERTIFICATION OF ENROLLMENT  
ENGROSSED SUBSTITUTE HOUSE BILL 1578

66th Legislature  
2019 Regular Session

- ESHB 1578 Section 3 (1)(d)(ii): “By December 31, 2021, complete a synopsis of changing vessel traffic trends”
- Synopsis will compare a year of pre-bill implementation data to a year of post-bill implementation data



# Background Information

## SOW Deliverables

Synopsis of Changing Vessel Traffic Trends

Scope of Work

1. Route selection (Rosario and Haro) and number of vessel transits pre-and post-bill implementation for the following vessel types.
  - a) vessels that newly fall under an escort requirement
  - b) deep draft and tug traffic that have no additional escort requirement
  - c) vessels that are providing bunkering or refueling services
2. Review of tugs engaged in escorting including number of transits, names of vessels, and operating companies.
3. Number of oil transfers per terminal and per anchorage pre- and post-bill implementation.
4. A review of the last 5 years of existing vessel transit data,



# Background Information

## SOW Timeline: 2021

Synopsis of Changing Vessel Traffic Trends

Scope of Work

- **November 4:** Ecology delivers initial draft synopsis to BPC
- **December 2:** Ecology delivers final draft to BPC
- **December 31:** BPC publishes the Synopsis and submits to the legislature



# Routes for vessels newly under escort requirement

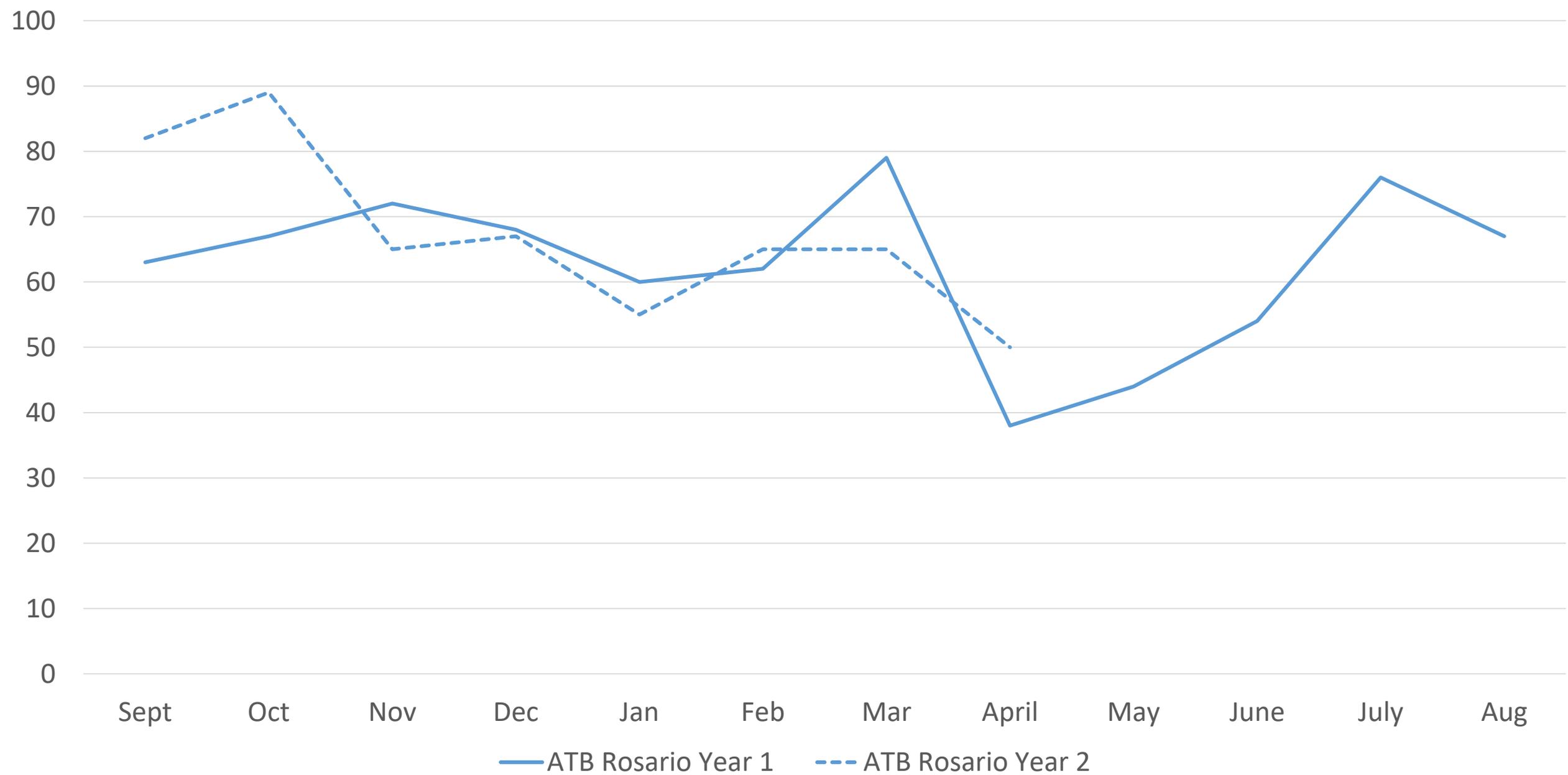
(Likely laden and unknown – excludes likely unladen and engaged in bunkering)

- **> 5,000 ATB**
  - Rosario Year 1 and 2
  - Haro Year 1 and 2
- **>5,000 Barge**
  - Rosario Year 1 and 2
  - Haro Year 1 and 2
- **<40,000 Tanker**
  - Rosario Year 1 and 2
  - Haro Year 1 and 2

\* This update will display graphical observations on transits of vessels newly under escort requirement, but will not analyze why these transit route were selected.

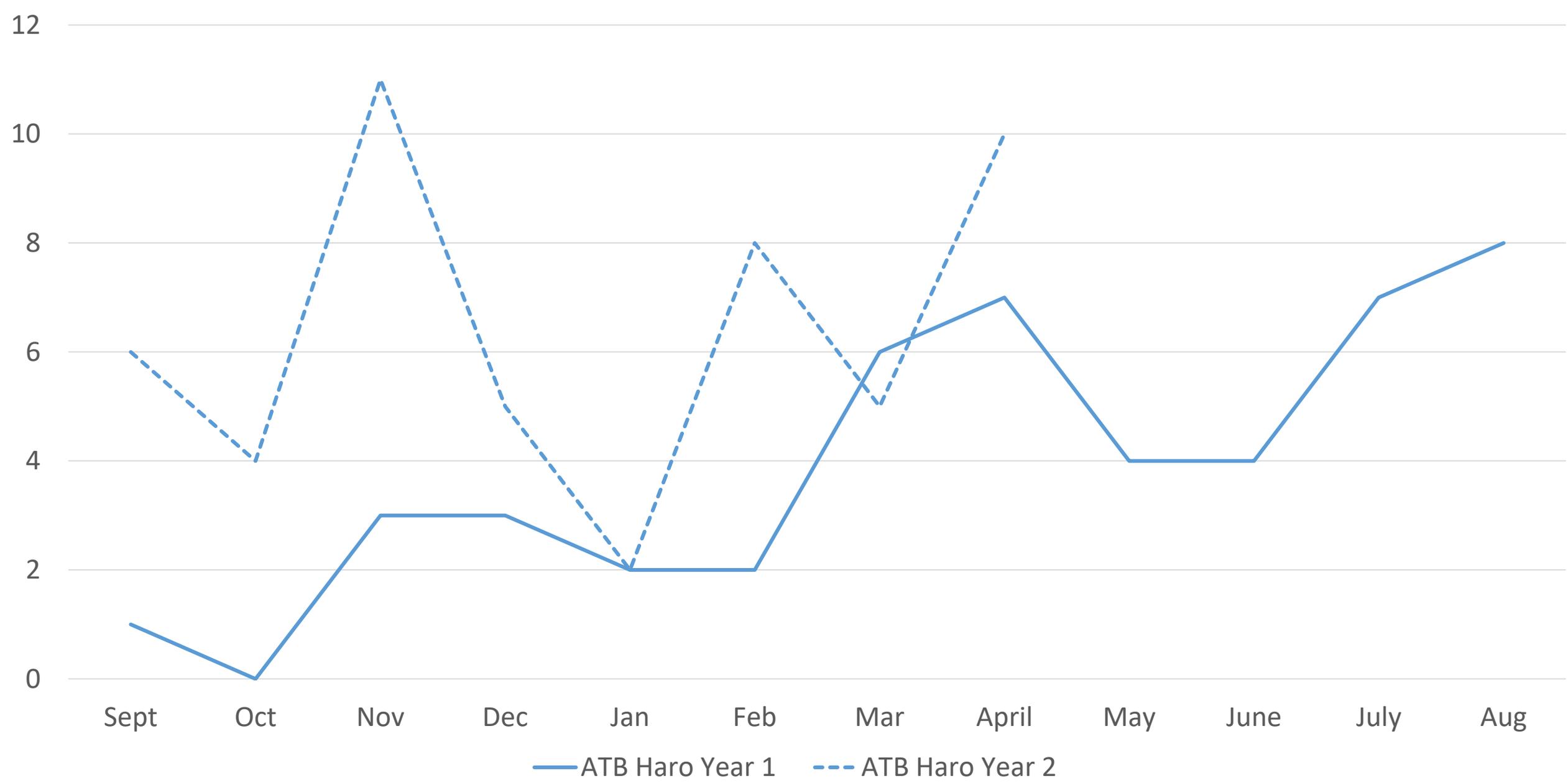


**DRAFT RESULTS: ATBs Year 1 and 2 - Rosario transits**  
(includes likely laden and unknown - excludes likely unladen & bunkering transits)

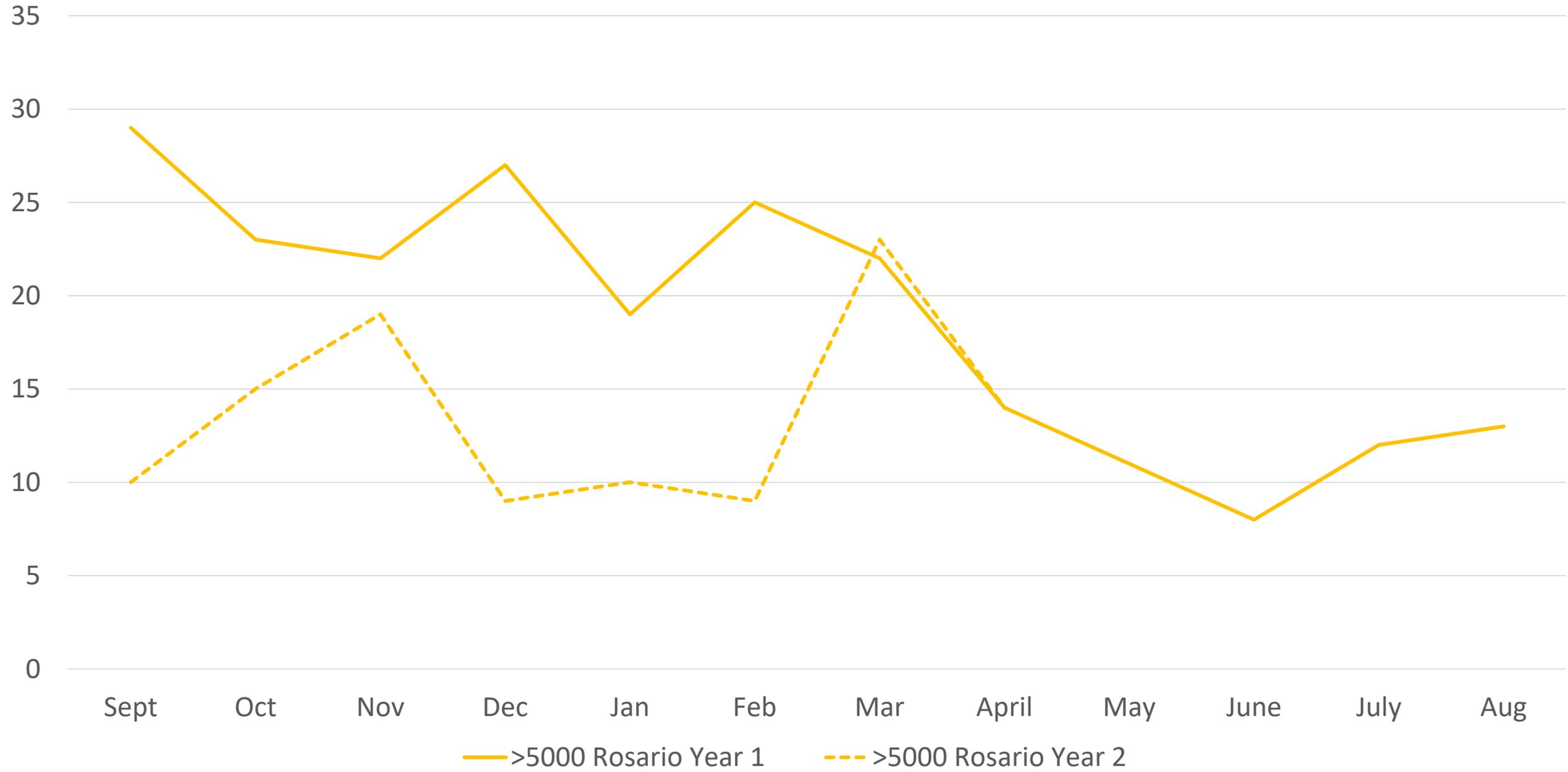


### DRAFT RESULTS: ATBs Year 1 and 2 - Haro transits

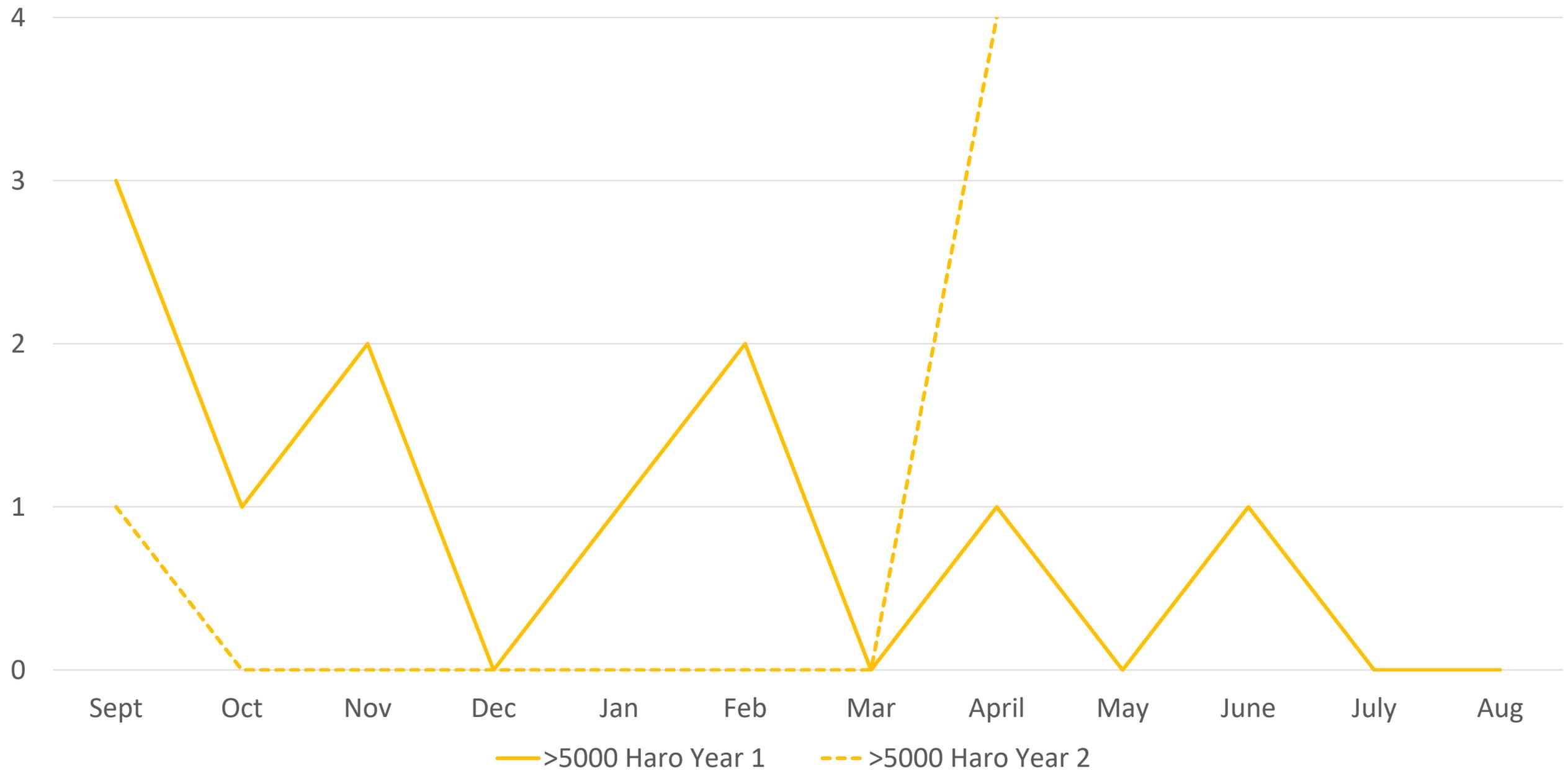
(includes likely laden and unknown - excludes likely unladen & bunkering transits)



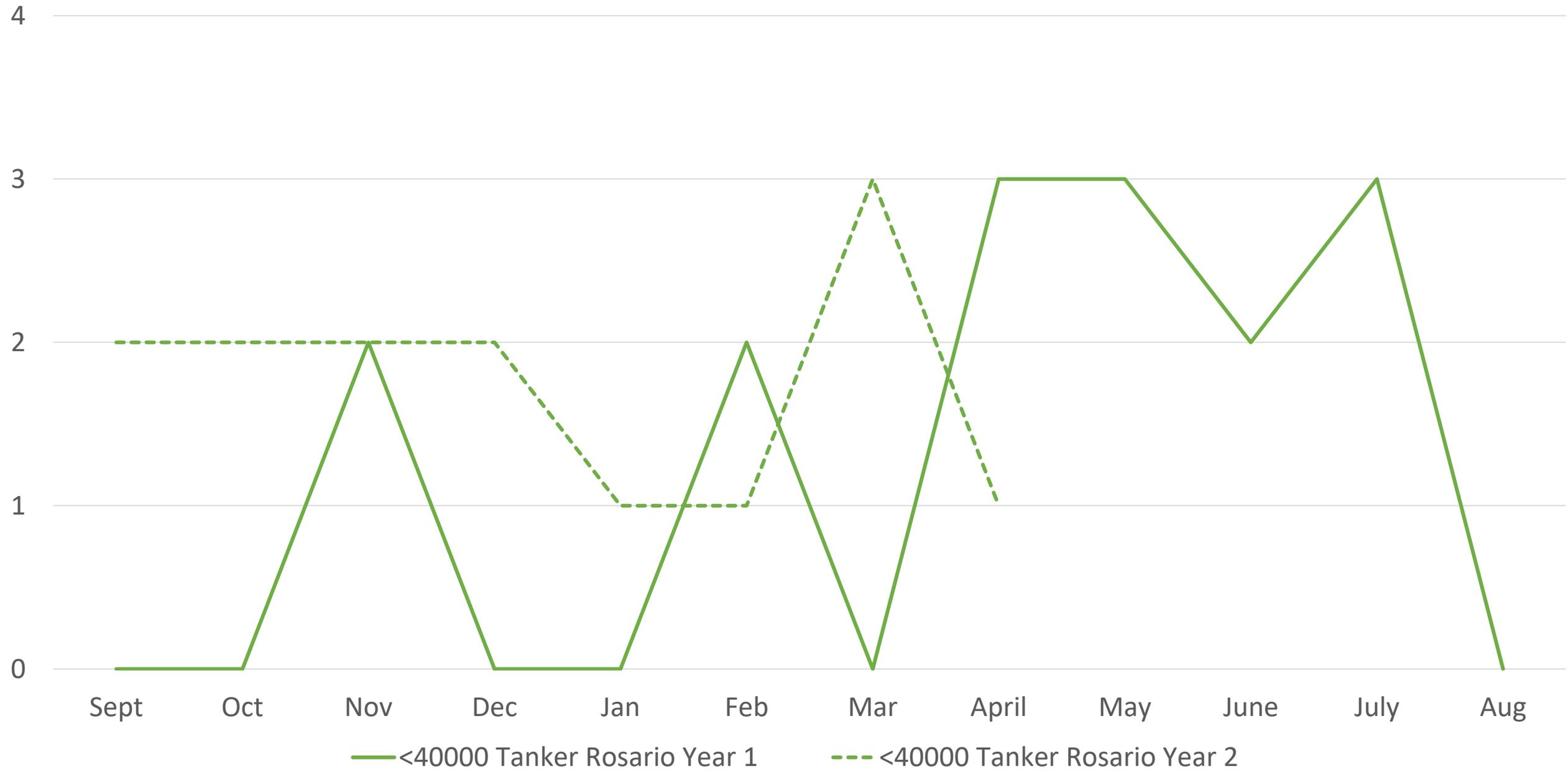
**DRAFT RESULTS: > 5,000 Barges Year 1 and 2 - Rosario transits**  
(includes likely laden and unknown - excludes likely unladen & bunkering transits)



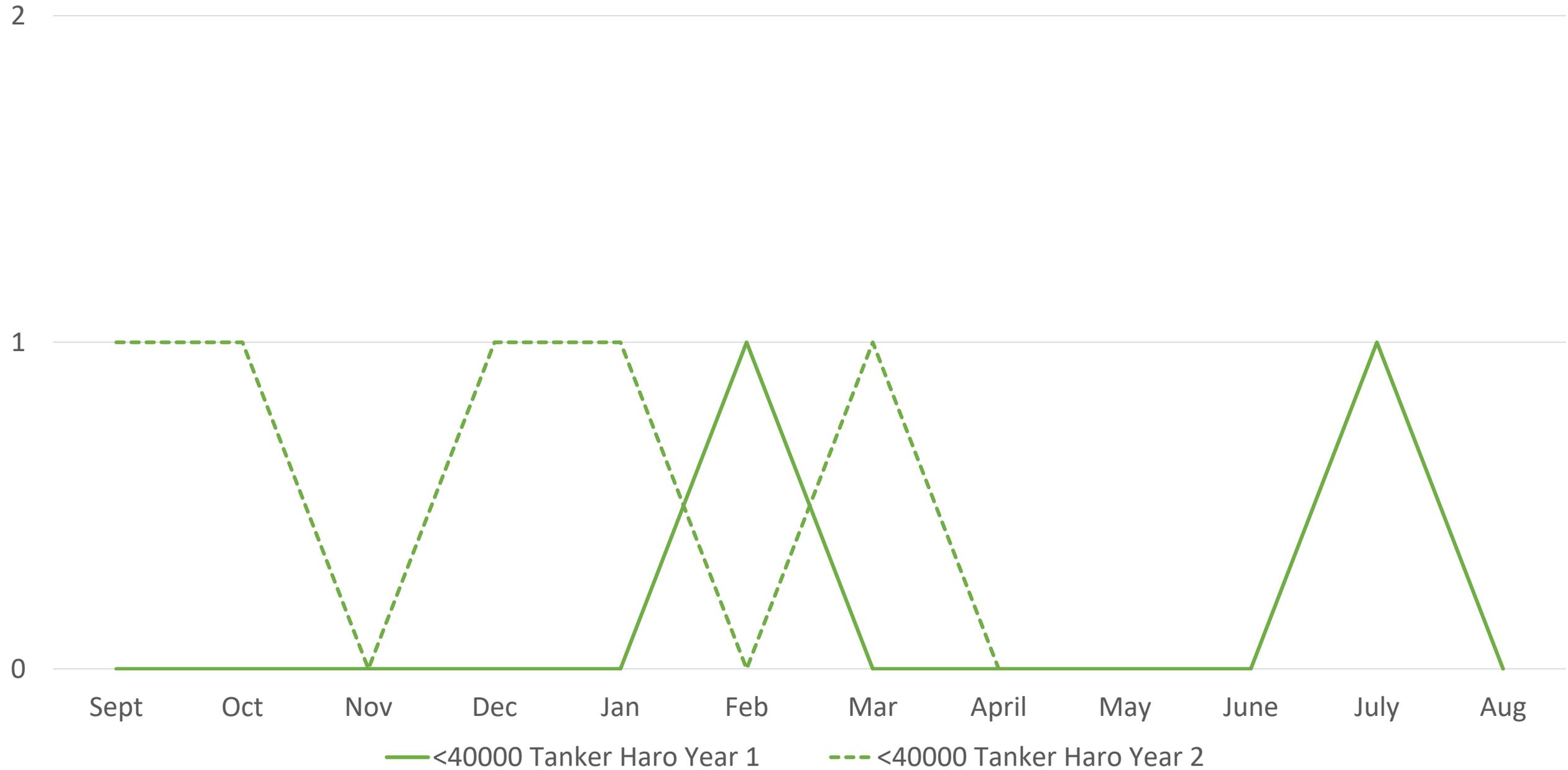
**DRAFT RESULTS: > 5,000 Barges Year 1 and 2 - Haro transits**  
(includes likely laden and unknown - excludes likely unladen & bunkering transits)



**DRAFT RESULTS: < 40,000 Tanker Year 1 and 2 - Rosario transits**  
(includes likely laden and unknown - excludes likely unladen & bunkering transits)



**DRAFT RESULTS: < 40,000 Tanker Year 1 and 2 - Haro transits**  
(includes likely laden and unknown - excludes likely unladen & bunkering transits)



# Routes for vessels engaged in bunkering

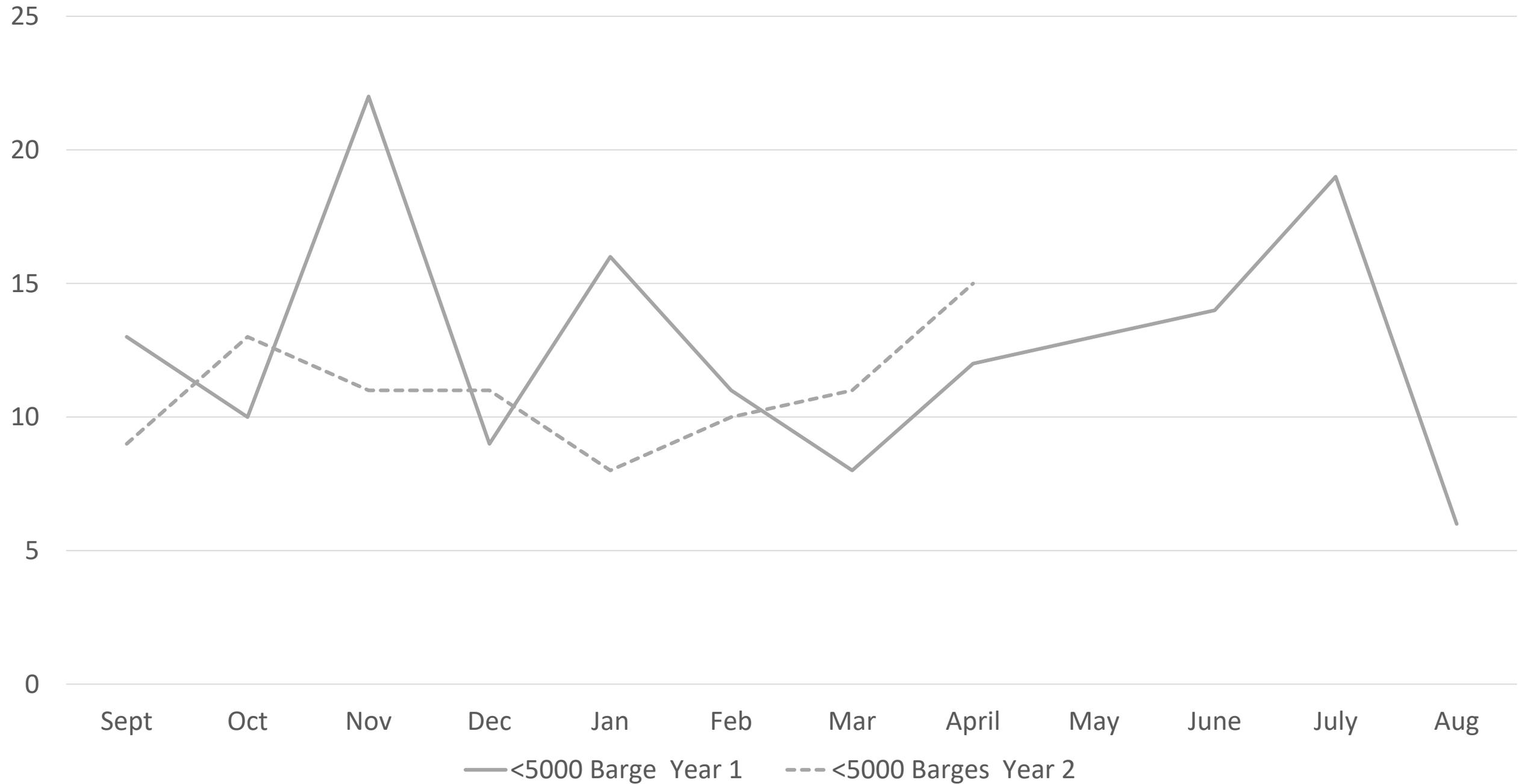
- >5,000 barges engaged in bunkering Rosario Year 1 and 2
- <5,000 barge engaged in bunkering Rosario Year 1 and 2



# DRAFT RESULTS: Rosario Transits of >5,000 Barges Engaged in Bunkering



DRAFT RESULTS: Rosario Transits of < 5,000 Barges Engaged in Bunkering



# Next Steps

- Continue work on Vessel Trend Synopsis
- Provide updated versions of these graphics in the monthly Board packet

