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

- **Container Vessels**
  - 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, 188, 209, 189, 174, 227

- **Tanker Vessels**
  - 2019 April through 2020 March: 132, 143, 158, 178, 193, 151, 174, 177, 149, 161, 175, 181
  - 2020 April through 2021 March: 171, 141, 137, 136, 125, 132, 139, 130, 130, 123, 122, 144

- **Bulkers Vessels**
  - 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, 96, 96, 107, 96, 91

- **Carrier & Ro-Ro**
  - 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: 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, 0

- **Other**
  - 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**

### SESSIONS & SPEAKERS

<table>
<thead>
<tr>
<th>Pacific Time (Seattle)</th>
<th>Eastern Time (Montreal)</th>
</tr>
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<tbody>
<tr>
<td>8:00 am</td>
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<tr>
<td>9:30 am</td>
<td>12:30 pm</td>
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<tr>
<td><strong>OPENING SESSION</strong></td>
<td><strong>THE CUSTOMERS’ PERSPECTIVE ON SUSTAINABLE SHIPPING</strong></td>
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<tr>
<td>9:30 am</td>
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<tr>
<td><strong>THE PATH TO DECARBONIZATION</strong></td>
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<td>10:30 am</td>
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<tr>
<td>Noon</td>
<td>3:00 pm</td>
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<tr>
<td><strong>NETWORKING &amp; EXHIBITION VISIT</strong></td>
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</tr>
<tr>
<td>Noon</td>
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<tr>
<td>12:30 pm</td>
<td>2:00 pm</td>
</tr>
<tr>
<td><strong>TERMINALS ADVANCE ENERGY AND EFFICIENCY</strong></td>
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<tr>
<td>12:30 pm</td>
<td>3:30 pm</td>
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<tr>
<td>2:00 pm</td>
<td>5:00 pm</td>
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</tbody>
</table>

**OPENING SESSION**
- Welcoming addresses

**THE CUSTOMERS’ PERSPECTIVE ON SUSTAINABLE SHIPPING**
- Panel discussion

**THE PATH TO DECARBONIZATION**
- Bryan Comer, *International Council on Clean Transportation*: Principles for evaluating the sustainability of marine fuels
- Paul Blomerus, *Clear Seas*: Unintended consequences: Identifying conflict between the dual objectives of reducing greenhouse gas emissions as well as air pollution from marine shipping
- Peter Keller, *SEA-LNG Ltd.*: Waiting is not an option
- Amanda McAlpin, *Argonne National Lab*: Analytical tools, funding, and collaboration with U.S. Department of Energy’s network of clean cities to help ports and tenants meet sustainability goals

**NETWORKING & EXHIBITION VISIT**

**TERMINALS ADVANCE ENERGY AND EFFICIENCY**
- Marko Dekovic, *Global Container Terminals*: The GCT Deltaport Intermodal Rail Yard Expansion Project
- Elizabeth Sheehan, *Climate Smart* and Shahira Esmail, *Radicle*: Supporting decarbonization and net-zero goals among tenants in Northwest ports
## SECTIONS & SPEAKERS

### INTERNATIONAL LEADERS IN SMART SHIPPING

- **8:00 am - 9:30 am**
  - **8:00 am - 9:00 am**
    - **Dita Brujin, Port of Rotterdam/PortXchange:** How just-in-time sailing contributes to shipping decarbonization
  - **9:00 am - 9:30 am**
    - **Lee Kindberg, Maersk:** Progress towards zero emissions shipping
  - **9:30 am - 10:00 am**
    - **Fabrice Klein, Port of Bordeaux:** Green port for sustainable city and ship industries
  - **10:00 am - 10:30 am**
    - **Gavin Allwright, International Windship Association:** Re-wind Not Rewind – How Wind Propulsion is a Key Decarbonisation Solution for the 2020s

### NETWORKING & EXHIBITION VISIT

- **9:30 am - 12:30 pm**

### PROTECTING MARINE MAMMALS AND BIODIVERSITY

- **10:30 am - 1:30 pm**
  - **10:30 am - 11:00 am**
    - **Denis Tran, Transport Canada:** Quiet vessels initiative
  - **11:00 am - 11:30 am**
    - **Scott Gende, United States National Park Service:** Whale strike reduction measures in partnership with the Southeast Alaska Pilots Association
  - **11:30 am - 12:00 pm**
    - **Kim Dunn, Stephanie Hewson, and Mike Kofahl, World Wildlife Fund:** Reducing Impacts from Shipping in Marine Protected Areas: New resources for the shipping industry
  - **12:00 pm - 12:30 pm**
    - **Stephanie MacNeil, Khtada Environmental Services and Jason Scherr, Prince Rupert Port Authority:** Innovation in monitoring and protection of Marine Mammals during Fairview Terminal Construction

### EXHIBITION VISIT

- **3:00 pm - 5:00 pm**

### CERTIFICATION CEREMONY VIRTUAL NETWORKING EVENT

- **5:00 pm - 6:00 pm**

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[www.green-marine.org/greentech](http://www.green-marine.org/greentech)
<table>
<thead>
<tr>
<th>Pacific Time (Seattle)</th>
<th>Eastern Time (Montreal)</th>
<th>SESSIONS &amp; SPEAKERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>8:00 am</strong> - 9:30 am</td>
<td>11:00 am - 12:30 pm</td>
<td><strong>SUSTAINABLE INFRASTRUCTURE</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Rob Schweinfurth, <em>United States Environmental Protection Agency</em>: Preparing for strategic green infrastructure investments</td>
</tr>
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<td></td>
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<td>• Karen Imas, <em>Waterfront Alliance</em>: Waterfront Edge Design Guidelines: Resilience and innovation in industrial waterfronts (featuring McInnis Cement)</td>
</tr>
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<td>• Sophie Boisvert, <em>Norda Stelo</em>: Intelligently increase the sustainability of port assets to become a better societal partner</td>
</tr>
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<td>• Adam Tindall-Schlicht, <em>Port Milwaukee</em>: Rebuilding resilient port infrastructure after a severe weather event</td>
</tr>
<tr>
<td><strong>9:30 am</strong></td>
<td>12:30 pm</td>
<td><strong>NETWORKING &amp; EXHIBITION VISIT</strong></td>
</tr>
<tr>
<td><strong>10:30 am</strong> - Noon</td>
<td>1:30 pm - 3:00 pm</td>
<td><strong>SHIP OWNERS PARTNER AND PILOT TECHNOLOGIES</strong></td>
</tr>
<tr>
<td></td>
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<td>• Dave Belisle, <em>Algoma</em>: Integrated agnostic performance management system</td>
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<td>• Nick Hunter, <em>NETScorp</em>: Key ingredients for a successful LNG towboat conversion</td>
</tr>
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<td></td>
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<td>• Jennifer States, <em>Washington Maritime Blue</em> and Matthew Lankowski, <em>Glosten</em> (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</td>
</tr>
<tr>
<td></td>
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<td>• Rhiannah Carver and Yousef El Bagoury, <em>CSL Group</em>: CSL: Biofuel testing on Great lakes vessels</td>
</tr>
<tr>
<td><strong>Noon</strong></td>
<td>3:00 pm</td>
<td><strong>NETWORKING &amp; EXHIBITION VISIT</strong></td>
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<tr>
<td><strong>12:30 pm</strong> - 2:00 pm</td>
<td>3:30 pm - 5:00 pm</td>
<td><strong>PASSENGER VESSELS ELECTRIFY</strong></td>
</tr>
</tbody>
</table>
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 severe 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...
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...
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

<table>
<thead>
<tr>
<th>Port</th>
<th>Feb 2021</th>
<th>Feb 2020</th>
<th>% Change</th>
<th>Feb 2021 YTD</th>
<th>Feb 2020 YTD</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles</td>
<td>101,208</td>
<td>134,469</td>
<td>-24.7%</td>
<td>220,535</td>
<td>282,675</td>
<td>-22.0%</td>
</tr>
<tr>
<td>Long Beach</td>
<td>119,416</td>
<td>125,559</td>
<td>-4.9%</td>
<td>235,670</td>
<td>234,183</td>
<td>0.6%</td>
</tr>
<tr>
<td>San Pedro Bay</td>
<td>220,624</td>
<td>260,028</td>
<td>-15.2%</td>
<td>456,205</td>
<td>516,858</td>
<td>-11.7%</td>
</tr>
<tr>
<td>Totals</td>
<td>349,430</td>
<td>406,861</td>
<td>-14.1%</td>
<td>711,675</td>
<td>807,944</td>
<td>-11.9%</td>
</tr>
<tr>
<td>Oakland</td>
<td>69,588</td>
<td>78,280</td>
<td>-11.1%</td>
<td>138,735</td>
<td>156,122</td>
<td>-11.1%</td>
</tr>
<tr>
<td>NWSA</td>
<td>59,218</td>
<td>68,553</td>
<td>-13.6%</td>
<td>116,735</td>
<td>134,964</td>
<td>-13.5%</td>
</tr>
<tr>
<td>USWC Totals</td>
<td>349,430</td>
<td>406,861</td>
<td>-14.1%</td>
<td>711,675</td>
<td>807,944</td>
<td>-11.9%</td>
</tr>
<tr>
<td>Boston</td>
<td>4,174</td>
<td>5,767</td>
<td>-27.6%</td>
<td>10,866</td>
<td>12,732</td>
<td>-14.7%</td>
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<tr>
<td>NYNJ</td>
<td>94,698</td>
<td>113,801</td>
<td>-16.8%</td>
<td>203,436</td>
<td>232,289</td>
<td>-12.4%</td>
</tr>
<tr>
<td>Maryland</td>
<td>19,564</td>
<td>20,049</td>
<td>-2.4%</td>
<td>39,468</td>
<td>40,410</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Virginia</td>
<td>87,466</td>
<td>80,834</td>
<td>8.2%</td>
<td>172,154</td>
<td>160,162</td>
<td>7.5%</td>
</tr>
<tr>
<td>South Carolina</td>
<td>67,411</td>
<td>74,235</td>
<td>-9.2%</td>
<td>135,348</td>
<td>142,740</td>
<td>-5.2%</td>
</tr>
<tr>
<td>Georgia</td>
<td>111,045</td>
<td>125,953</td>
<td>-11.8%</td>
<td>224,410</td>
<td>247,913</td>
<td>-9.5%</td>
</tr>
<tr>
<td>Jaxport</td>
<td>43,408</td>
<td>38,451</td>
<td>12.9%</td>
<td>87,022</td>
<td>80,392</td>
<td>8.2%</td>
</tr>
<tr>
<td>Port Everglades</td>
<td>29,787</td>
<td>34,613</td>
<td>-13.9%</td>
<td>60,582</td>
<td>68,096</td>
<td>-11.0%</td>
</tr>
<tr>
<td>Miami</td>
<td>26,020</td>
<td>34,043</td>
<td>-23.6%</td>
<td>53,630</td>
<td>69,367</td>
<td>-22.7%</td>
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<tr>
<td>USEC Totals</td>
<td>483,573</td>
<td>527,746</td>
<td>-8.4%</td>
<td>986,916</td>
<td>1,054,101</td>
<td>-6.4%</td>
</tr>
<tr>
<td>New Orleans</td>
<td>23,161</td>
<td>24,417</td>
<td>-5.1%</td>
<td>44,595</td>
<td>50,630</td>
<td>-11.9%</td>
</tr>
<tr>
<td>Houston</td>
<td>79,840</td>
<td>110,854</td>
<td>-20.8%</td>
<td>179,534</td>
<td>229,636</td>
<td>-21.8%</td>
</tr>
<tr>
<td>USGC Totals</td>
<td>103,001</td>
<td>135,271</td>
<td>-23.9%</td>
<td>224,129</td>
<td>280,266</td>
<td>-20.0%</td>
</tr>
<tr>
<td>Vancouver</td>
<td>74,109</td>
<td>84,918</td>
<td>-12.7%</td>
<td>153,303</td>
<td>163,074</td>
<td>-6.0%</td>
</tr>
<tr>
<td>Prince Rupert</td>
<td>12,130</td>
<td>19,380</td>
<td>-37.4%</td>
<td>28,748</td>
<td>29,115</td>
<td>-1.3%</td>
</tr>
<tr>
<td>British Columbia</td>
<td>86,239</td>
<td>104,298</td>
<td>-17.3%</td>
<td>182,051</td>
<td>192,189</td>
<td>-5.3%</td>
</tr>
<tr>
<td>Totals</td>
<td>435,669</td>
<td>511,159</td>
<td>-14.8%</td>
<td>893,726</td>
<td>1,000,133</td>
<td>-10.6%</td>
</tr>
</tbody>
</table>

Source: Individual Ports
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

<table>
<thead>
<tr>
<th>Port</th>
<th>Feb 2021</th>
<th>Feb 2020</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles</td>
<td>1,634,832</td>
<td>1,350,181</td>
<td>21.1%</td>
</tr>
<tr>
<td>Long Beach</td>
<td>1,535,741</td>
<td>1,165,257</td>
<td>31.8%</td>
</tr>
<tr>
<td>NYNJ</td>
<td>1,346,404</td>
<td>1,196,148</td>
<td>12.6%</td>
</tr>
<tr>
<td>Georgia</td>
<td>850,411</td>
<td>742,076</td>
<td>14.6%</td>
</tr>
<tr>
<td>Vancouver</td>
<td>600,705</td>
<td>497,159</td>
<td>20.8%</td>
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<tr>
<td>Manzanillo</td>
<td>555,985</td>
<td>503,091</td>
<td>10.5%</td>
</tr>
<tr>
<td>NWSA</td>
<td>551,619</td>
<td>524,749</td>
<td>5.1%</td>
</tr>
<tr>
<td>Virginia</td>
<td>519,495</td>
<td>435,050</td>
<td>19.4%</td>
</tr>
<tr>
<td>Houston</td>
<td>453,802</td>
<td>524,247</td>
<td>-13.4%</td>
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<tr>
<td>South Carolina</td>
<td>398,533</td>
<td>408,234</td>
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<td>389,651</td>
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<td>Montreal</td>
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<td>209,258</td>
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<td>Miami</td>
<td>206,159</td>
<td>189,528</td>
<td>8.8%</td>
</tr>
<tr>
<td>Lazaro Cardenas</td>
<td>186,576</td>
<td>208,355</td>
<td>-10.5%</td>
</tr>
<tr>
<td>Prince Rupert</td>
<td>173,640</td>
<td>181,288</td>
<td>-4.5%</td>
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<tr>
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<tr>
<td>Philadelphia</td>
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<td>108,100</td>
<td>-4.5%</td>
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<td>New Orleans</td>
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<td>103,531</td>
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<tr>
<td>Boston</td>
<td>34,607</td>
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<td>8,684,469</td>
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<td>US Mainland Only</td>
<td>8,671,757</td>
<td>7,742,231</td>
<td>12.0%</td>
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</table>

Source Individual Ports
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 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).
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...
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 shared 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.

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
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

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### 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

<table>
<thead>
<tr>
<th>Year</th>
<th>Almonds</th>
<th>Pistachios</th>
<th>Walnuts</th>
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</thead>
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<td>2015</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016</td>
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<td></td>
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<tr>
<td>2017</td>
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<td>2018</td>
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<td>2019</td>
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<td></td>
</tr>
<tr>
<td>2020</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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...
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.

Protecting Blue Whales and Blue Skies
Program starts May 15

Enrollment information for shipping companies online now.

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

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Import Dwell Time Is Down For March; 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
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.
The Board of Pilotage Commissioners (BPC) requests the following information be provided to the BPC staff:

### Activity Report

#### Total Pilotage Assignments
- Total pilotage assignments: 534
- Cancellations: 17

#### Total Ship Moves
- Total ship moves: 517
- Container: 206
- Tanker: 123
- General/Bulk: 121
- Other: 67

#### Assignments Delayed Due to Unavailable Rested Pilots
- 2 pilot jobs: 30
- Reason: PSP GUIDELINES FOR RESTRICTED WATERWAYS
- Total delay time: 1.25

#### Callback Days/Comp Days

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<th>Used (-)</th>
<th>Burned (-)</th>
<th>Ending Total</th>
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<td>52</td>
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#### Pilot Repositions
- Total number of pilot reposition: 100
- Upgrade trips: 12
- YTD: 52

#### 3 Consecutive Night Assignments
- 27

#### YTD
- 105

#### PSP Guidelines for Restricted Waterways

### Callback Days/Comp Days

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<thead>
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<th>Starting Total</th>
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<th>Used (-)</th>
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</tbody>
</table>

### Out of Regular Dispatch Rotation

#### A. Training & Continuing Education Programs

<table>
<thead>
<tr>
<th>Start Dt</th>
<th>End Dt</th>
<th>City</th>
<th>Facility</th>
<th>Program Description</th>
<th>Pilot Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-Apr</td>
<td>6-Apr</td>
<td>Seattle</td>
<td>PMI</td>
<td>BPC EXAM</td>
<td>BOZ, EME, HUP, KEP, MCN, MYE, SID</td>
</tr>
<tr>
<td>7-Apr</td>
<td>7-Apr</td>
<td>Seattle</td>
<td>PMI</td>
<td>BPC EXAM</td>
<td>ANT, SCR</td>
</tr>
<tr>
<td>11-Apr</td>
<td>12-Apr</td>
<td>Seattle</td>
<td>PMI</td>
<td>BPC EXAM</td>
<td>GRK, SCR</td>
</tr>
<tr>
<td>13-Apr</td>
<td>13-Apr</td>
<td>Seattle</td>
<td>PMI</td>
<td>BPC EXAM</td>
<td>SCR</td>
</tr>
<tr>
<td>14-Apr</td>
<td>14-Apr</td>
<td>Seattle</td>
<td>PMI</td>
<td>BPC EXAM</td>
<td>GRK, SCR</td>
</tr>
<tr>
<td>15-Apr</td>
<td>17-Apr</td>
<td>Seattle</td>
<td>PMI</td>
<td>BPC EXAM</td>
<td>SCR</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Start Dt</th>
<th>End Dt</th>
<th>City</th>
<th>Group</th>
<th>Meeting Description</th>
<th>Pilot Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Apr</td>
<td>1-Apr</td>
<td>Seattle</td>
<td>PSP</td>
<td>First Class Pilotage Quals</td>
<td>COL</td>
</tr>
<tr>
<td>6-Apr</td>
<td>6-Apr</td>
<td>Seattle</td>
<td>PSP</td>
<td>BC Coast Pilots</td>
<td>COL</td>
</tr>
<tr>
<td>6-Apr</td>
<td>6-Apr</td>
<td>Seattle</td>
<td>PSP</td>
<td>UTC</td>
<td>MOT, VON</td>
</tr>
<tr>
<td>7-Apr</td>
<td>7-Apr</td>
<td>Auburn</td>
<td>PSP</td>
<td>HUN-Funeral Rep</td>
<td>KLA</td>
</tr>
<tr>
<td>7-Apr</td>
<td>7-Apr</td>
<td>Seattle</td>
<td>BPC</td>
<td>BPC</td>
<td>COL</td>
</tr>
<tr>
<td>8-Apr</td>
<td>8-Apr</td>
<td>Seattle</td>
<td>PSP</td>
<td>Administrative</td>
<td>KLA</td>
</tr>
<tr>
<td>8-Apr</td>
<td>8-Apr</td>
<td>Seattle</td>
<td>PSP</td>
<td>BC-PPA</td>
<td>COL</td>
</tr>
<tr>
<td>13-Apr</td>
<td>13-Apr</td>
<td>Seattle</td>
<td>PSP</td>
<td>BOD</td>
<td>ANA, COL, GRD, GRK, KLA, NEW</td>
</tr>
<tr>
<td>13-Apr</td>
<td>13-Apr</td>
<td>Everett</td>
<td>PSP</td>
<td>Port of Everett Outreach</td>
<td>VON</td>
</tr>
<tr>
<td>19-Apr</td>
<td>19-Apr</td>
<td>Seattle</td>
<td>BPC</td>
<td>BPC</td>
<td>ANT, BEN, SCR</td>
</tr>
<tr>
<td>Start Dt</td>
<td>End Dt</td>
<td>REASON</td>
<td>PILOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>--------</td>
<td>--------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-Apr</td>
<td>13-Apr</td>
<td>Not fit for</td>
<td>BUJ</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-Apr</td>
<td>5-Apr</td>
<td>ETO</td>
<td>ANA, CAW, KAL, KEA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13-Apr</td>
<td>19-Apr</td>
<td>ETO</td>
<td>EME, HEN, JEN, ROU, SEY</td>
<td></td>
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</tr>
<tr>
<td>27-Apr</td>
<td>30-Apr</td>
<td>ETO</td>
<td>ANT, MCG, MOT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29-Apr</td>
<td>30-Apr</td>
<td>ETO</td>
<td>KNU</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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

What’s Next?! Briefing Session

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

Why, What, How & What’s Next?!
equity & justice for all
The Office of Equity

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.
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

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.
Student Succeeds Act long-term goals.

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

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

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

<table>
<thead>
<tr>
<th>RACE &amp; ETHNICITY</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>African American</td>
<td>16.3%</td>
</tr>
<tr>
<td>Asian American</td>
<td>7.9%</td>
</tr>
<tr>
<td>Latino</td>
<td>16.0%</td>
</tr>
<tr>
<td>Native American</td>
<td>21.0%</td>
</tr>
<tr>
<td>White</td>
<td>8.2%</td>
</tr>
</tbody>
</table>

Unemployment Rate by Race

Washington State, 2010-2019

- Native Hawaiian/Pacific Islander: 4.2% (2019), 5.7% (2010)
- Latinx: 5.2% (2019), 10.0% (2010)
- White: 4.4% (2019), 7.6% (2010)
- Asian: 3.5% (2019), 4.6% (2010)

Source: American Community Survey 1-Year Data, 2010-2019
Race and Ethnicity in Jails and Prisons

The Office of Equity

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

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.
The Office of Equity
What’s Next?!
Questions
May BPC Update:
Vessel Trend Synopsis
Routes for vessels newly under escort requirement
Background Information
ESHB 1578

- 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
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

- **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)

>5000 Rosario Year 1
>5000 Rosario Year 2
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

>5000 Barges  Year 1
>5000 Barges  Year 2
DRAFT RESULTS: Rosario Transits of < 5,000 Barges Engaged in Bunkering

<5000 Barge  Year 1
<5000 Barges  Year 2

<5000 Barge Year 1
<5000 Barges Year 2
Next Steps

• Continue work on Vessel Trend Synopsis

• Provide updated versions of these graphics in the monthly Board packet