



# PNW Import/Export Workshop

Update from The NWSA

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Business Development Manager



November 13, 2019



King County Voters

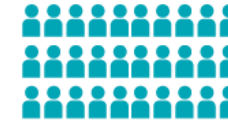


Port of Seattle Commission



*The Northwest Seaport Alliance is a **marine-cargo operating partnership** of the Port of Seattle and Port of Tacoma, established 2015*

Pierce County Voters



Port of Tacoma Commission





# THE NORTHWEST SEAPORT ALLIANCE

## Containerized Cargo – 2018 Port Rankings

SEATTLE

TACOMA

1

**LA/Long Beach**  
17,549,774 TEUs

2

**NY/NJ**  
7,179,792 TEUs

3

**Savannah**  
4,351,976 TEUs

4

**Seattle/Tacoma**  
3,797,626 TEUs

5

**Vancouver**  
3,396,449 TEUs



6 mi



# South Harbor • Tacoma



TAYLOR WAY AUTO FACILITY

EAST BLAIR 1 TERMINAL

PIERCE COUNTY TERMINAL

BLAIR TERMINAL

MARSHALL AVE AUTO FACILITY

WASHINGTON UNITED TERMINAL

LOT F

SOUTH INTERMODAL YARD

TOTE TERMINAL

HUSKY TERMINAL

EAST SITCUM TERMINAL

WEST SITCUM TERMINAL

NORTH INTERMODAL YARD

COMMENCEMENT BAY

CONTAINER TERMINAL    NON-CONTAINER TERMINAL    RAIL YARD



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[nwseaportalliance.com](http://nwseaportalliance.com)



# North Harbor • Seattle



 CONTAINER TERMINAL  NON-CONTAINER TERMINAL  RAIL YARD

ELLIOTT BAY



# Key Infrastructure: Husky Terminal



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# Key Infrastructure: Terminal 5



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# Terminal & Drayage Update

- Pierce County Terminal offers fixed hoot gates w/ no fee (Mon-Thu, 3am start)
- PCT & Husky recently implemented appointment systems
  - PCT: ALL transactions
  - HUSKY: Import delivery ONLY
- Husky Terminal offering ad hoc additional gates
- T-18 night gate program suspended. Terminal monitoring volumes for potential relaunch





# Clean Truck Program Update

- As of January 1, 2019 – all trucks serving international container terminals must have a 2007 or newer engine or equivalent
- Newer trucks reduce DPM emissions by up to 90% per truck
- NWSA installed RFID readers at all international terminals monitor compliance and gather turn time data
- Truck compliance at 100% since January 2019



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# International Rail Update

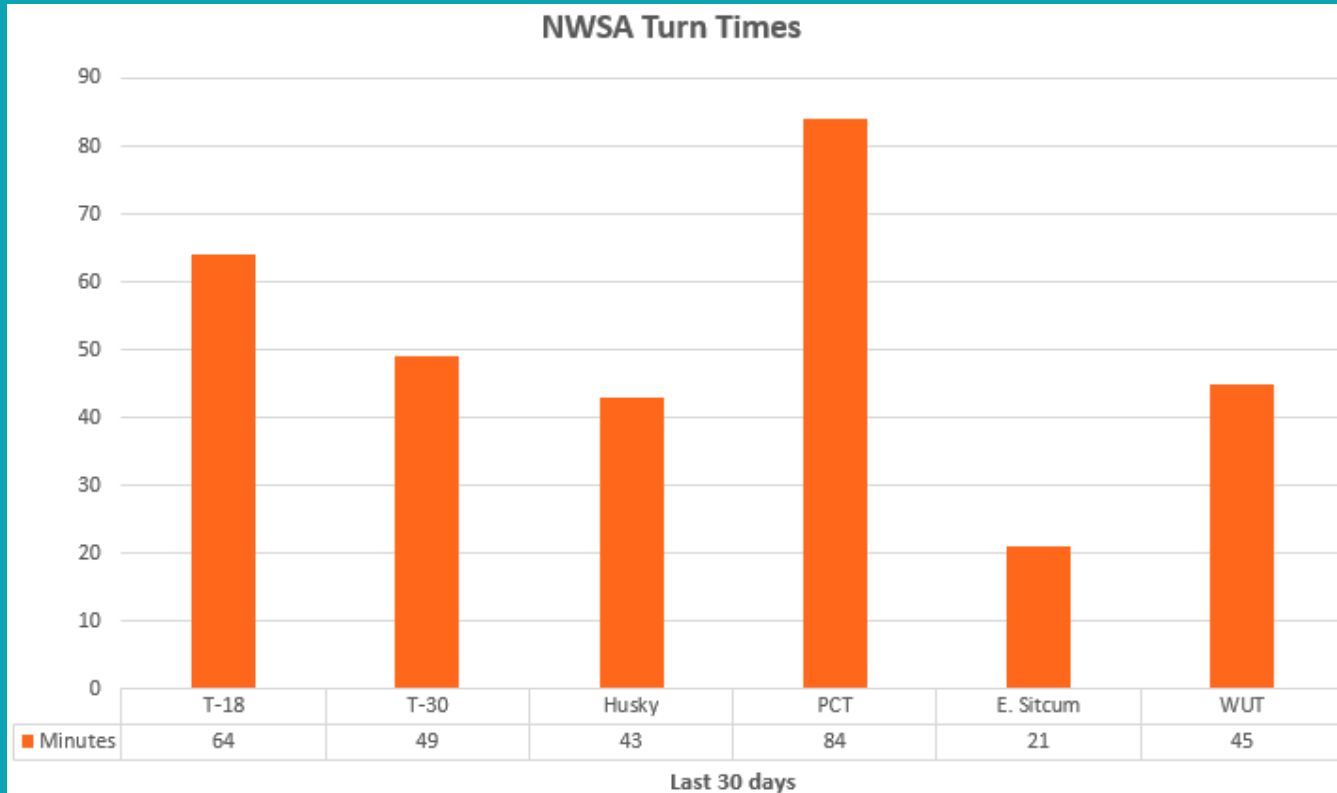
- T18, PCT, and WUT each have 2-3 on dock rail departures per week to Chicago; Husky Terminal has daily departures
- Consistently low terminal dwell times for Chicago direct cargo via on dock
- 80% of NIM Yard cargo: under 48 hour dwell
- Portland served by both BNSF & NWCS





# NWSA Performance Metric Update

- NWSA International Terminal Turn Times (last 30 days):



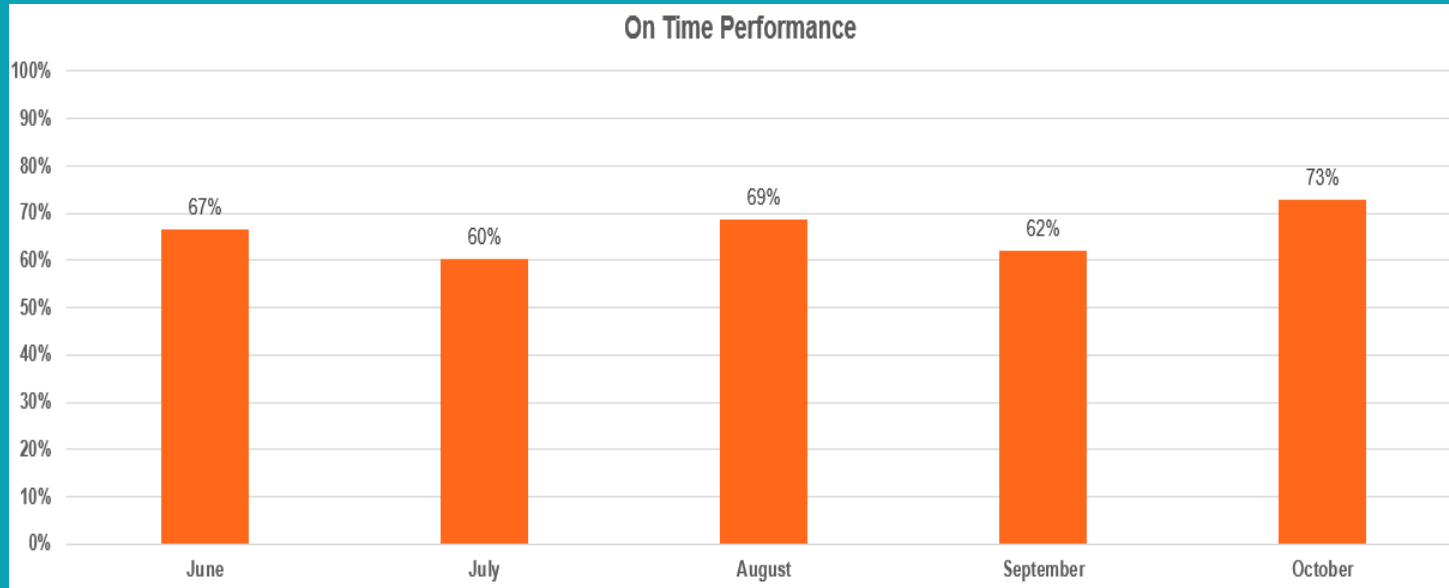
- Turn times represent average of single/dual transactions
- Turn times do not include terminal queue areas





# NWSA Performance Metric Update

## NWSA Vessel On-Time Arrival:

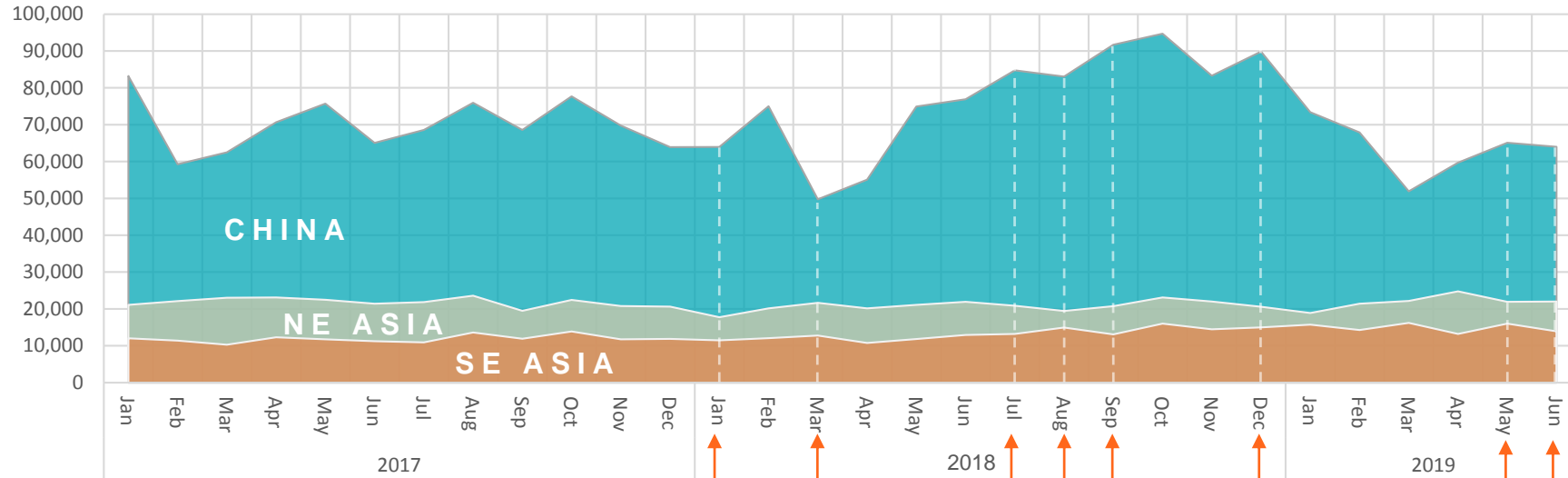


- On-time arrival performance continuing to improve
- Best Performing Services since May 2019:
  - Ocean Alliance- Columbus PNW (100%)
  - 2M Alliance- TP9/Maple (94%)
  - THE Alliance- PN4 (94%)
  - HMM- PN2 (89%)
  - SM Line- PNS (89%)





# Monthly Imports from Asia to NWSA (TEUs, Jan 2017-Jun 2019)



**JAN 2018:** Tariffs imposed on imports of solar panels & washing machines

**MAR 2018:** Tariffs imposed on imports of steel & aluminum

**JUL 2018:** Tariffs imposed on \$34B of Chinese imports

**AUG 2018:** Tariffs imposed on \$16B of Chinese imports

**SEP 2018:** 10% tariffs imposed on \$200B of Chinese imports, to increase to 25% by Jan 1, 2019.

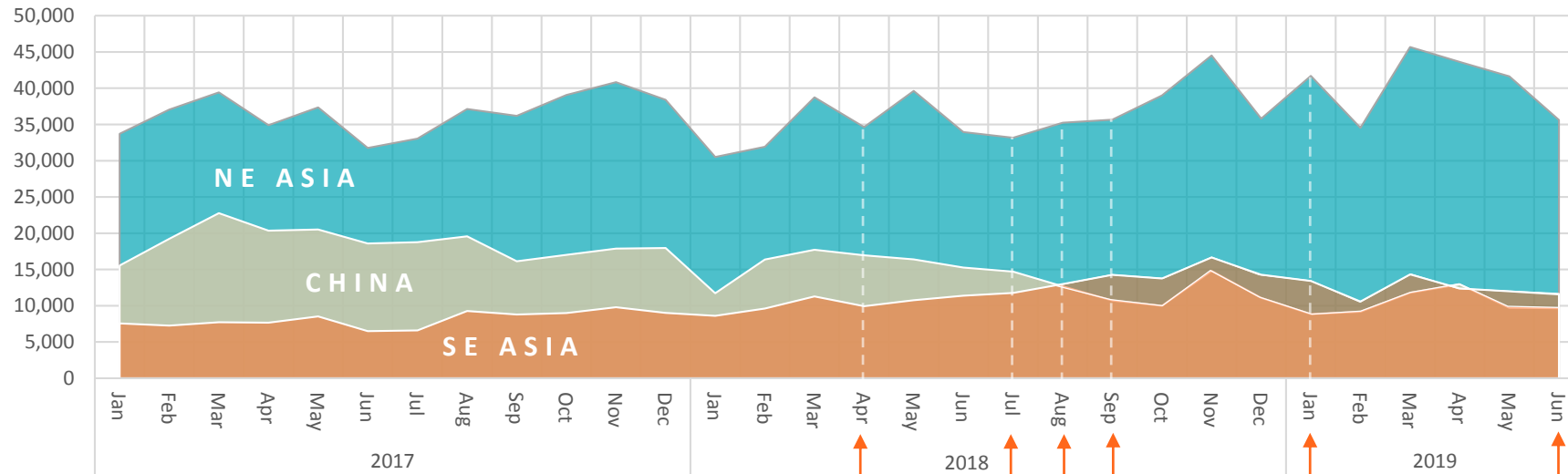
**DEC 2018:** Volume surge ahead of 25% tariff to be imposed on \$200B of Chinese imports

**MAY 2019:** Increase from 10%-25% tariffs on \$200B of Chinese imports

**JUN 2019:** US threatens tariffs on \$300B of Chinese imports



# Monthly Exports from the NWSA to Asia (TEUs, Jan 2017-Jun 2019)



**APR 2018:** Retaliation for US Section 232 tariffs

**JUL 2018:** Retaliation for US Section 301 tariffs (\$34B)

**AUG 2018:** Retaliation for US Section 301 tariffs (\$16B)

**SEP 2018:** Retaliation for US Section 301 tariffs (\$60B)

**JAN 2019:** Suspension of retaliation for US Section 301 tariffs against autos and parts

**JUN 2019:** Retaliation for US Section 301 tariffs (\$60B)







# The NWSA Value

- Consistently low rail dwell times, esp. Chicago direct
- On dock rail capacity and multiple services offers additional IPI opportunity
- Terminal productivity enhancements improving truck turn times
- Ongoing infrastructure improvements to support trade growth, larger vessels



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# Thank You

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