

West Coast Port Panel

Moderator:

Peter Friedmann, PCC Counsel

Panelists:

Steve Balaski - NWSA

Ron Brown - Port of Oakland

Marcel VanDijk - Port of Los Angeles

Noel Hacegaba - Port of Long Beach

Greg Borossay - Port of San Diego

Susan Ransom - SSA

Thomas Jelenic – PMSA





THE NORTHWEST
SEAPORT ALLIANCE

SEATTLE + TACOMA

Fast. Flexible. First Class.

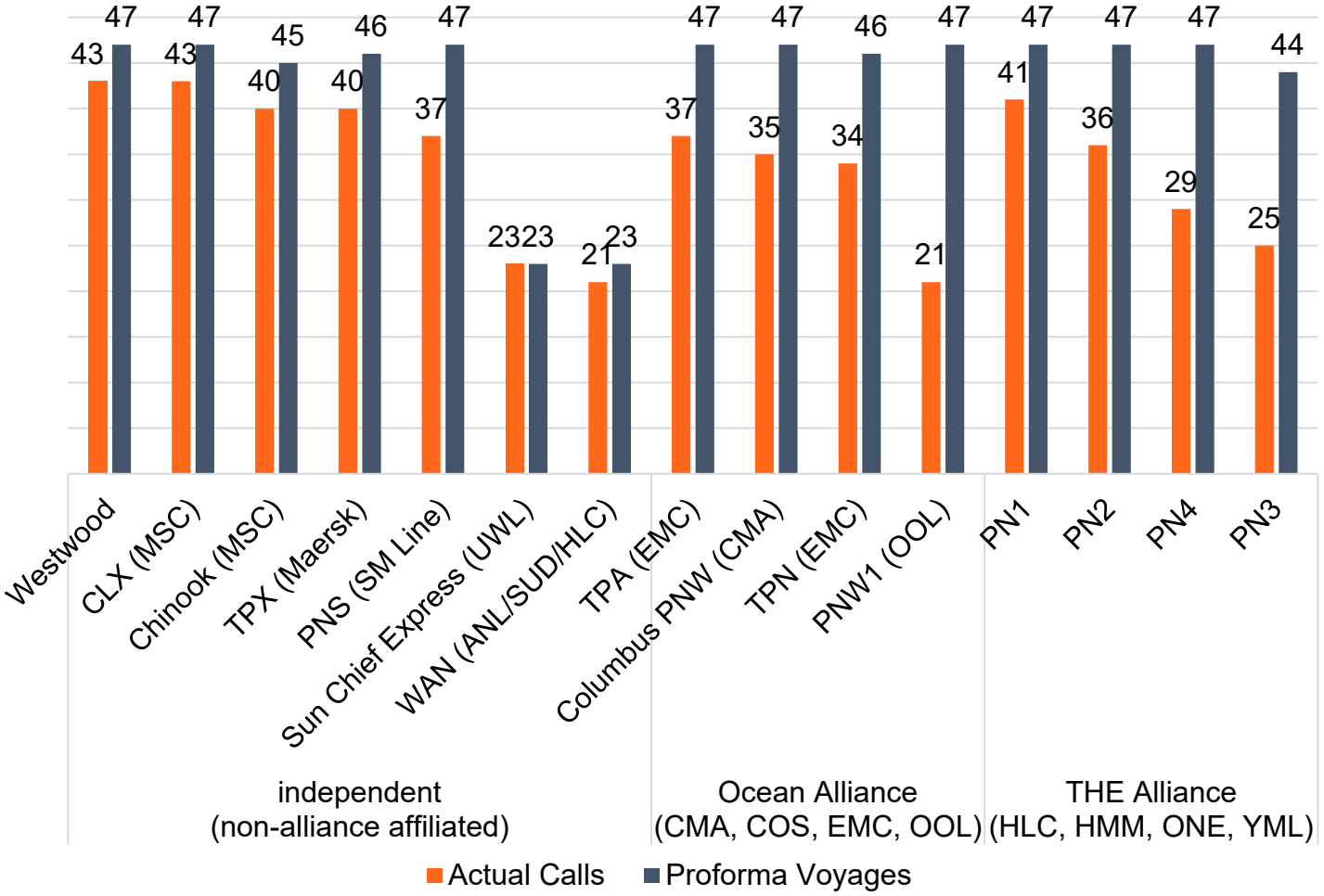
The NWSA Update for:

WESCCON 2023

Steve Balaski

October 28th, 2023

Ocean Service Reliability: Voyage Frequency



Actual vs. Proforma Voyages (proforma weeks 1-47 NWSA ETA)

Voyage frequency has greatly improved in 2023 vs. last year.

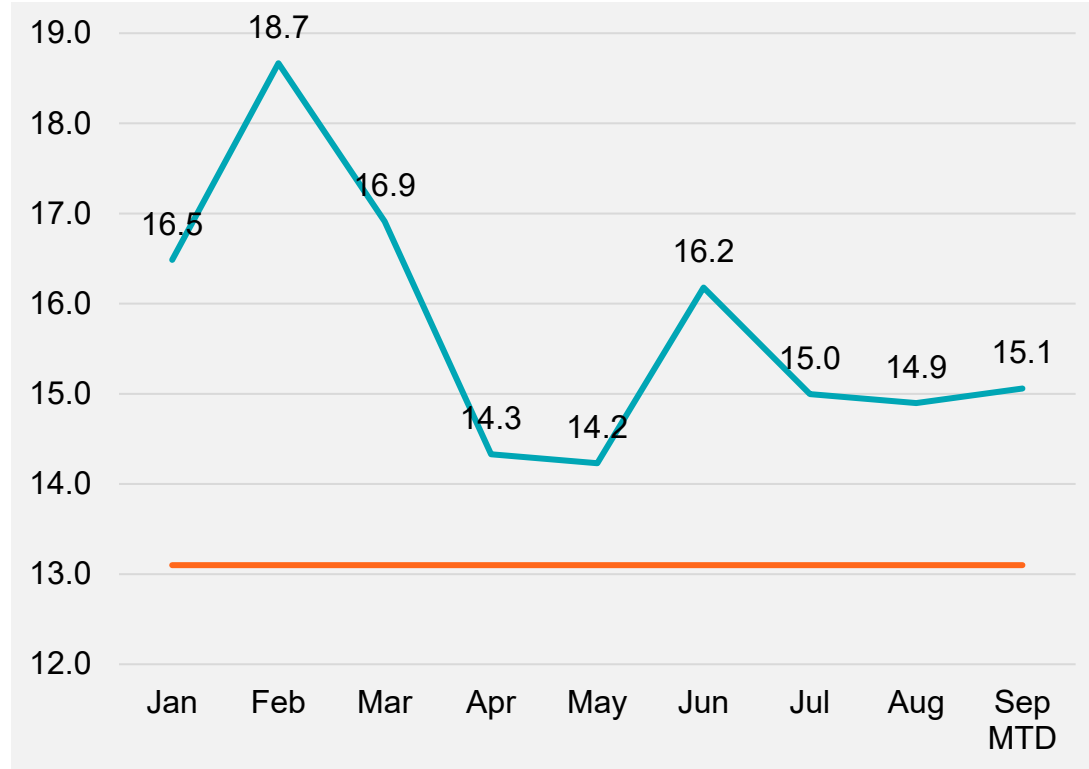
Average number of days delayed also improved, many services arriving within 1 day of proforma ETA.

Consistent, regular voyages improve landside fluidity and export volume.

PN3 suspension effective after week 44

Source: NWSA internal reporting using info ocean carrier websites, terminal data

Ocean Service Reliability: Speed of First Port of Call



NWSA First Port of Call (FPOC) Services: Opportunity to Achieve Proforma Transit

Chart measures average transit time from last Asia port of call to first NWSA call

Proforma transit (13.1 days) averages all 7 services' advertised transit time

No berth congestion, available terminal capacity contributing to improved results

Key BCO accounts now requiring fast transit, schedule integrity a key metric

Source: NWSA internal reporting using info ocean carrier websites, terminal data

Landside Fluidity: Export Receiving

Terminal, Service	2023 Q1	2023 Q2	2023 Q3	Average
Husky	3.9	3.6	3.4	3.6
PN2	3.9	3.6	3.5	3.7
PN3	4.0	3.6	3.1	3.5
PN1	--	3.0	--	3.0
PCT	5.8	6.2	6.2	6.1
TPA	5.9	6.3	6.4	6.2
TPN	5.8	6.0	6.0	5.9
T18	3.9	3.9	4.3	4.0
TPX	4.7	4.5	4.5	4.6
Columbus PNW	4.0	3.9	5.3	4.3
WAN	4.3	4.8	3.7	4.2
EB Service	--	4.0	4.0	4.0
Sun Chief Express	--	4.0	3.9	3.9
CLX	4.0	3.0	--	3.5
PNS	2.4	2.9	3.0	2.7
T30	4.1	4.0	3.3	3.9
EB Service	4.1	4.1	--	4.1
PNW1	4.0	4.0	3.8	3.9
Sun Chief Express	4.0	3.8	--	3.9
PNS	--	--	3.0	3.0
T5	3.4	4.1	4.8	4.2
Chinook	3.4	3.9	5.1	4.2
CLX	3.3	4.3	4.6	4.2
WUT	4.1	4.2	4.1	4.1
PN4	4.2	4.2	4.0	4.1
PN1	4.0	4.2	4.1	4.1
Average	4.2	4.2	4.4	4.3

Average Number of Export Receiving Days Have Stabilized

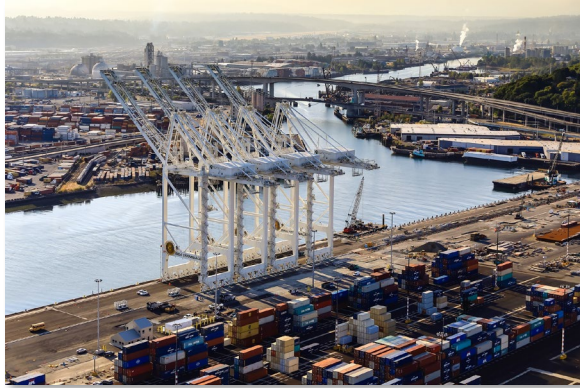
The number of days for dry cargo have increased to 4+ days in 2023, an improvement over 2022

Exporters prefer consistent 4+ day windows to fulfill bookings, some carriers have goal of 5+ days

Note: Date from terminal websites, number of days can vary by shippers' agreement with their ocean carrier

Source: NWSA internal reporting using terminal website data

Infrastructure Developments



Terminal 5

- Phase 2 (south berth) expected Q1 2024
- 2 more STS cranes, new RTG cranes
- Additional reefer plugs planned
- Final annual TEU capacity: 1.2 million



Husky Terminal

- Backlands capacity expansion underway
- 4 new RTG cranes being commissioned, 8 more arriving 2024 Q4
- Reefer racks and additional plugs planned (1200 total)



International Container Cargo Support Facility

- 24.5 acre container yard planned in Tacoma
- Intended to increase marine terminal fluidity by offering storage, staging
- Currently solicitating [proposals](#)

Harbor Deepening Projects to -57' MLLW



Seattle Harbor
 Design: 2023-2025
 Construction: Beginning 2025*

Tacoma Harbor
 Design: 2023-2025
 Construction: Beginning 2025*

*current estimate



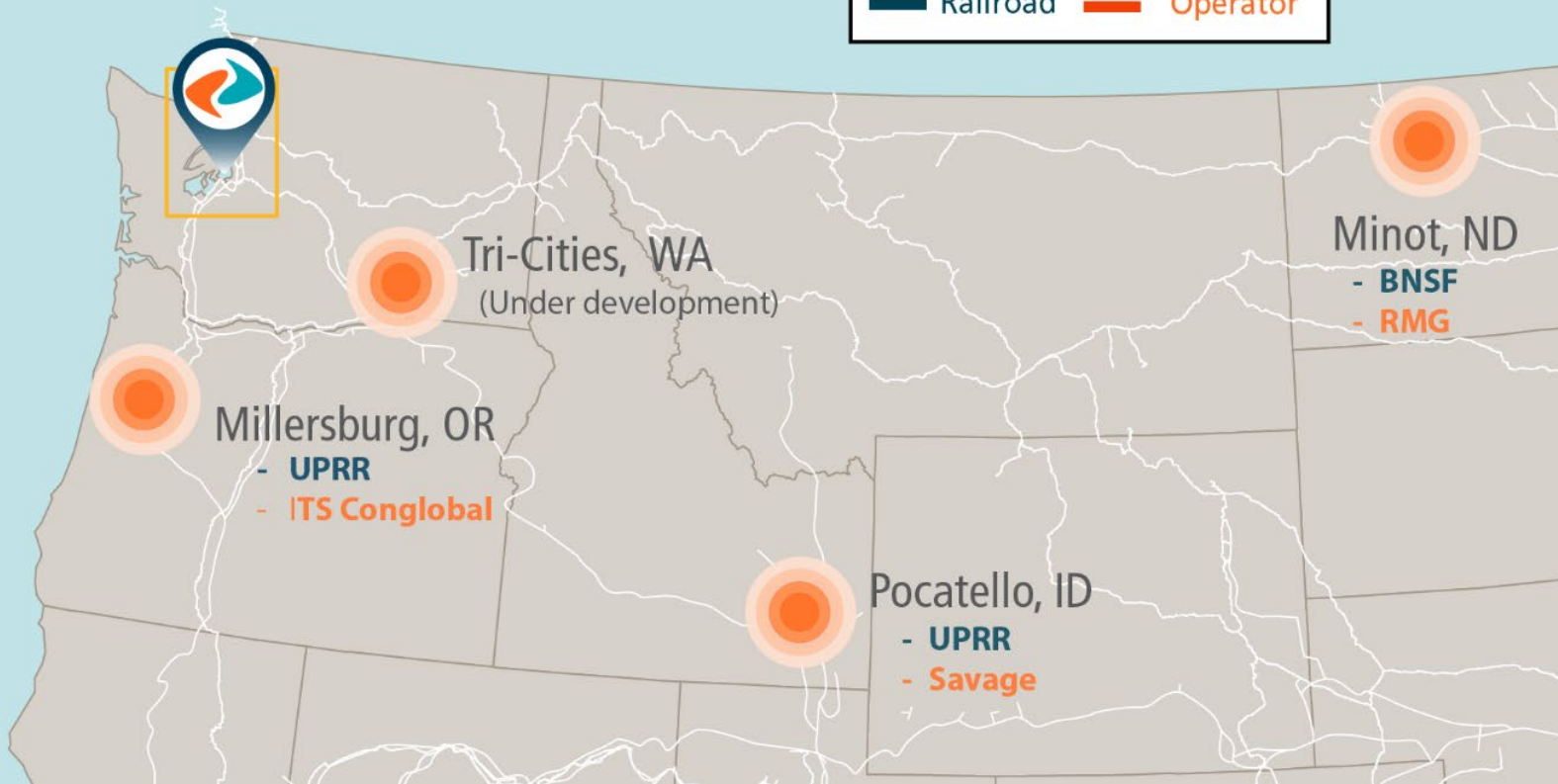
NWSA Strategic Initiatives – Inland Rail Hubs

- Support export growth through expanded capacity and services.
- Leverage hubs to establish import and two-way rail service.

Results

- **Minot, ND: export intermodal service launched October 2020. BNSF**
- **Pocatello, ID: Savage Railport launched June 2021. UPRR**
- **Millersburg, OR: MVIC Intermodal Terminal opened November 2022. UPRR**
- **Tri-Cities, WA: Projects under development.**

INLAND RAIL YARDS



Climate & Sustainable Practices



Shore Power at all terminals by 2030



Busan-NWSA Green Corridor planned



Lower-carbon cargo-handling



Launched ZE Truck Collaborative

Northwest Ports Clean Air Strategy

The central goal of the NWSA's renewed Clean Air Strategy is to eliminate air and climate pollution at our gateway by 2050.

The NWSA recognizes that climate change is one of the biggest challenges we face as an international community. We are committed to taking direct action, collaborating with customers and industry partners, and using our voice to advocate for necessary collective action. More details available [here](#).



First Class: Customer Service & Increased Cargo Demand

BCOs are choosing The NWSA for award-winning customer service, commitment to collaboration and efficient supply chain ecosystem.



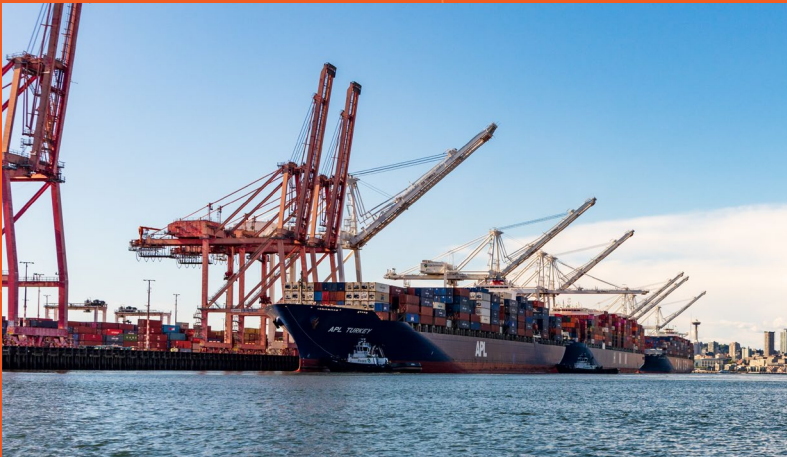
- Multi “Quest for Quality” award winner in the Ease of Doing Business Category (Logistics Management).
- Engaged Business Development & Ops teams to support and promote your volume
- Ongoing partnership with labor, railroads for planning
- Region is home to numerous top BCO facilities anchoring volume in the region, including Ace Hardware, Ashley Furniture, Bass Pro Shops, Costco, Kroger, IKEA, Michaels Stores, Nintendo, SanMar, etc.
- In 2024 two new distribution centers opening: Floor & Décor and Harbor Freight Tools



Thank You

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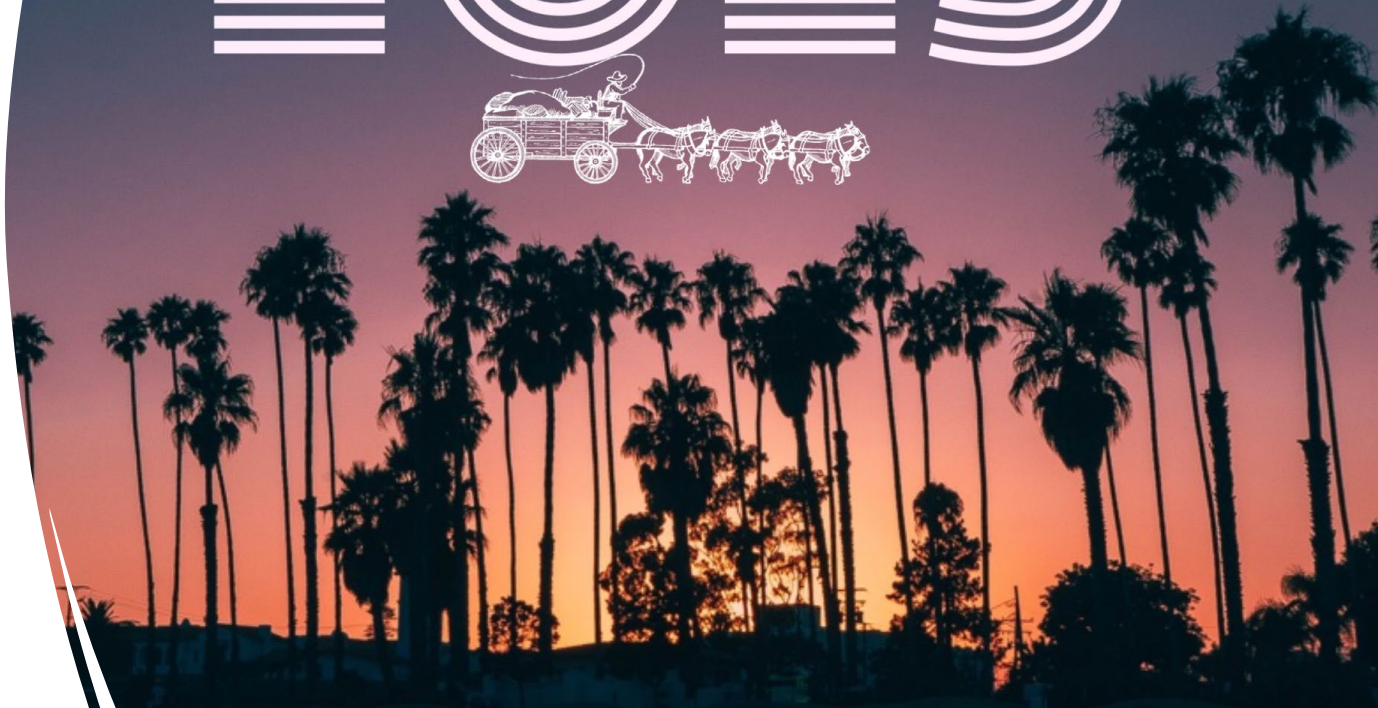
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Presenter: Greg Borossay

WIESCCON

2023



Two All-Electric Heavy Lift Cranes

- 400 Metric Ton Lift Capacity
- Delivered July 2023. Fully operational December 2023
- Highest lift capacity on US Westcoast



First of its Kind

- First fully electric crane system in NA
- Replaces 25 yr old all-diesel crane at POSD



American Marine Highway M-5

- RFP for badge operations closed June 2023
- POSD awarded \$5.5 million
- Multiple Sponsors
- SB voyage from the PNW to deliver lumber products to SoCal
- NB voyage will reposition empty containers to PNW





THANK YOU

Greg Borossay
Port of San Diego

