

# The Changing Dynamics of Freight

Commissioner Dick  
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# Today: A Grim Picture

## TEU's by West Coast Ports

	2007 Dec.	2007 Dec. YTD	2008 Dec.	2008 Dec. YTD	% Change Monthly	% Change YTD
<b>Port of Tacoma</b>	166,762	1,924,936	146,175	1,861,352	<b>-12.3%</b>	<b>-3.3%</b>
<b>Port of Seattle</b>	154,896	1,973,504	112,135	1,704,492	<b>-27.6%</b>	<b>-13.6%</b>
Port of Portland	21,374	260,128	18,207	242,979	-14.8%	-6.6%
Port of Oakland	193,332	2,388,182	166,946	2,236,244	-13.6%	-6.4%
Port of L.A.	661,402	8,355,039	561,033	7,849,987	-15.2%	-6.0%
Port of Long Beach	575,355	7,312,465	429,946	6,487,816	-25.3%	-11.3%
Port of Vancouver	207,724	2,495,522	181,770	2,492,107	-12.5%	-0.1%
<b>December Total</b>	<b>1,980,845</b>	<b>24,709,775</b>	<b>1,616,212</b>	<b>22,874,977</b>	<b>-18.4%</b>	<b>-7.4%</b>



# Today: A Grim Picture

## TEU's by West Coast Ports

	2008 Feb.	2008 Feb YTD	2009 Feb.	2009 Feb YTD	% Change Monthly	% Change YTD
<b>Port of Tacoma</b>	148,901	278,760	123,497	232,762	<b>-17.1%</b>	<b>-16.5%</b>
<b>Port of Seattle</b>	149,712	286,355	94,635	223,472	<b>-36.8%</b>	<b>-22.0%</b>
Port of Portland	21,029	43,122	15,817	31,778	-24.8%	-26.3%
Port of Oakland	180,827	368,133	132,755	290,697	-26.6%	-21.0%
Port of L.A.	613,726	1,265,962	413,910	1,000,914	-32.6%	-20.9%
Port of Long Beach	529,699	1,051,041	318,042	717,337	-40.0%	-31.7%
Port of Prince Rupert	5,717	15,306	13,173	26,207	122.3%	71.2%
Port of Vancouver	211,837	397,348	145,131	311,839	-31.5%	-21.5%
<b>December Total</b>	<b>1,861,657</b>	<b>3,706,027</b>	<b>1,256,960</b>	<b>2,835,006</b>	<b>-32.5%</b>	<b>-23.5%</b>



# Our Customers

**Top 15 Carriers \***  
*(based on 2008 TEU capacity of fleet)*

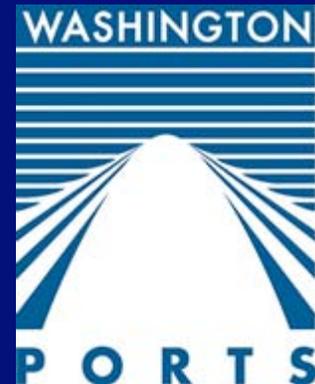
Rank	Carrier	TEUs	Port of Call In Washington State
1	Maersk	1,622,966	Seattle
2	Mediterranean Shipping	1,520,809	
3	CMA-CGM	874,395	Seattle
4	Evergreen	629,615	Tacoma
5	Hapag Lloyd	491,580	Seattle
6	COSCO	464,869	Seattle
7	APL	431,582	Seattle
8	China Shipping Line	385,931	Seattle
9	MOL	365,605	Tacoma
10	Hanjin	357,544	Seattle
11	NYK	355,742	Seattle (moving to Tacoma 2012)
12	OOCL	317,473	Seattle
13	Yang Ming	316,649	Tacoma
14	K-Line	258,648	Tacoma
15	Hyundai	258,648	Tacoma

# Tomorrow: Potential Good News

## 2009 Marine Cargo Forecast

### Cargo Volumes 2007-2030

- Containers: 3.6 million TEUs to 9.7 million TEUs (4.1% annual growth)
- Autos: 690,000 units to 1.5 million units
- Log Exports: level
- Breakbulk: 2.3 million tons to 3 million tons
- Grain: Modest growth



# Tomorrow: Potential Good News 2009 Marine Cargo Forecast

## Transportation Volumes 2007-2030

- Road: 1.45 million trips to 2.75 million trips (port related)
- Rail: 42 million tons to 65 million tons
  - 40% of state rail activity is port related

