



Seattle+Tacoma Update

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THE NORTHWEST
SEAPORT ALLIANCE

SEATTLE + TACOMA

SEATTLE HARBOR



BNSF SOUTH SEATTLE YARD

99

W. MARGINAL WAY
E. MARGINAL WAY

509

TERMINAL 115

UNION PACIFIC ARGO YARD

DUWAMISH WATERWAY

5

SPOKANE STREET

99

BNSF SIG YARD

TERMINAL 30

TERMINAL 18

TERMINAL 5

ON-DOCK RAIL

519

TERMINAL 46

EAST WATERWAY

ON-DOCK RAIL

WEST WATERWAY

BNSF RAIL YARD

ELLIOTT BAY



THE NORTHWEST SEAPORT ALLIANCE
SEATTLE + TACOMA

CONTAINER TERMINAL

RAIL YARD

TACOMA HARBOR



W. HYLEBOS TERMINAL

TAYLOR WAY AUTO FACILITY

E. BLAIR 1

PIERCE COUNTY TERMINAL

BLAIR TERMINAL

PCT INTERMODAL YARD

MARSHALL AVE AUTO FACILITY

WASHINGTON UNITED TERMINAL

HYUNDAI INTERMODAL YARD

LOT F

SOUTH INTERMODAL YARD

UP DOMESTIC

BNSF DOMESTIC

NORTH INTERMODAL YARD

TOTE TERMINAL

HUSKY TERMINAL

EAST SITCUM TERMINAL

WEST SITCUM TERMINAL

COMMENCEMENT BAY

CONTAINER TERMINAL

RAIL YARD

NON-CONTAINER

THE NORTHWEST SEAPORT ALLIANCE
SEATTLE + TACOMA

FOSS WATERWAY

Ocean Carriers by NWSA Terminal

TERMINAL 18

Operated by SSA Terminals

- ANL
- CMA CGM
- COSCO Shipping Lines
- Hamburg Süd
- Hapag-Lloyd
- Maersk
- Mediterranean Shipping Co.
- OOCL
- Wan Hai

TERMINAL 5

Operated by SSA Terminals

- Mediterranean Shipping Co.

TERMINAL 30

Operated by SSA Terminals

- CMA CGM
- COSCO Shipping Lines
- Evergreen
- OOCL
- SM Line
- Swire Shipping/UWL
- Westwood Shipping Lines

TERMINAL 46

Alternative Maritime Use

TOTE MARITIME ALASKA TERMINAL

Operated by TOTE Maritime Alaska

- TOTE Maritime Alaska

HUSKY TERMINAL

Operated by Husky Terminal & Stevedoring

- Hapag-Lloyd
- HMM
- Ocean Network Express (ONE)
- Yang Ming Line

EAST SITCUM TERMINAL

Alternative Maritime Use

WEST SITCUM TERMINAL

(SSA Terminal)

Operated by SSA Terminals Tacoma

- Matson Navigation

PIERCE COUNTY TERMINAL (PCT)

Operated by Everport Terminal Services

- CMA CGM
- COSCO Shipping Lines
- Evergreen
- OOCL

WASHINGTON UNITED

TERMINAL (WUT)

Operated by Washington United Terminals

- Hapag-Lloyd
- HMM
- Ocean Network Express (ONE)
- Yang Ming Line





Current state of operations

- No vessel wait for NWSA berth
- Terminal utilization varies by terminals
 - T5/T18/T30/PCT have ad hoc gate closures due to low volume
 - Husky/WUT have extra gates, higher turn times due to recent increase in volume, expected to improve next 2 weeks
- Recent diversion of VAN cargo due to congestion caused by BC port closures in July
- IPI rail dwell 2-4 days, Husky & WUT higher
- Winter deployment announced but schedule reliability is improving



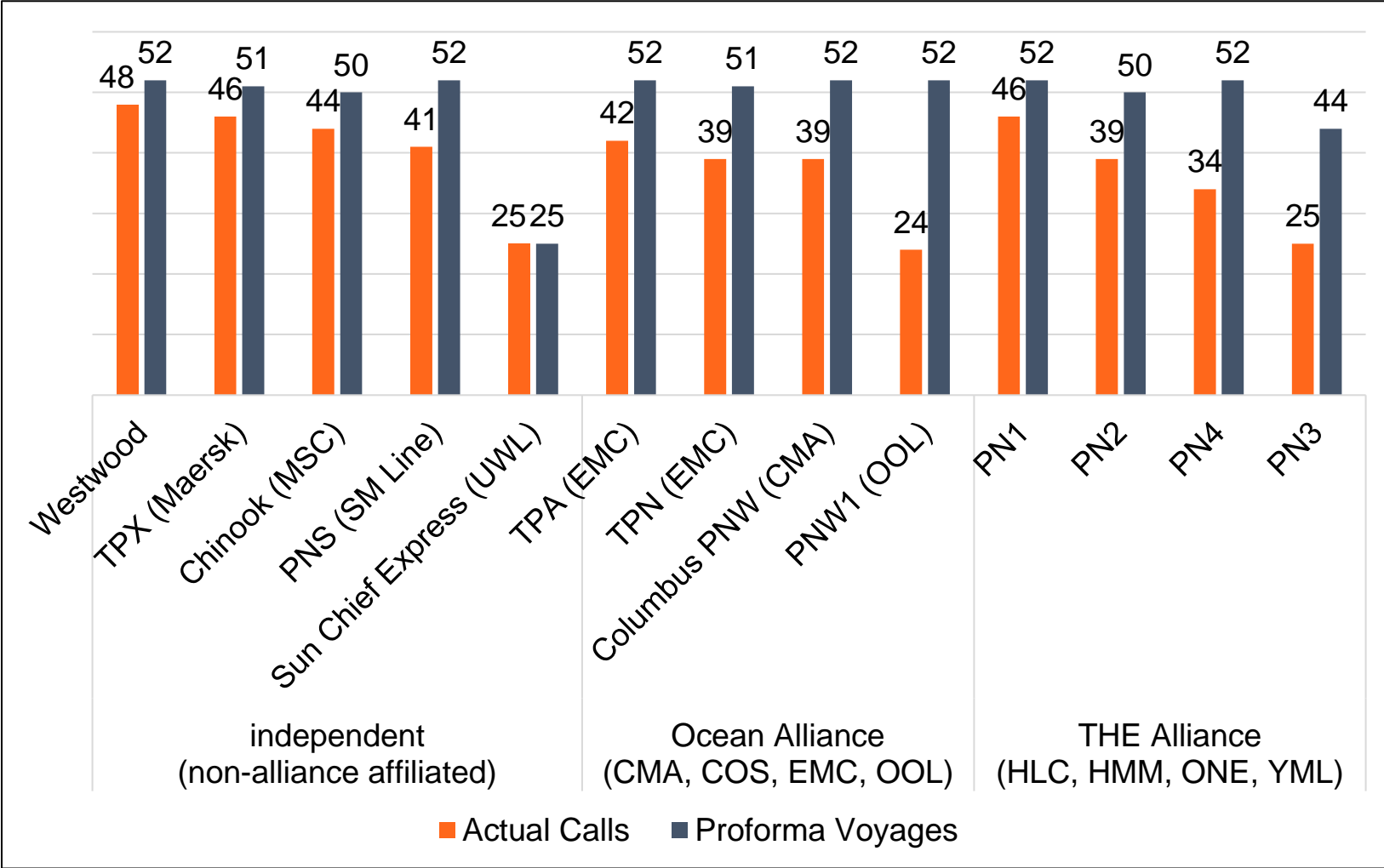


Fast: Ocean Services

- 15 liner services – 6 of them are first port call in North America from Asia
- All major ocean carriers operate in the gateway
- NWSA remains the closest U.S. port even from SE Asia (PKL, SIN, LCH, VN ports)
- Fastest transit times from South China & Vietnam
 - Swire/UWL Sun Chief Express: Ho Chi Minh City to Seattle = 18 days
 - Ocean Alliance (EMC, CMA, COS, OOL) TPN: Yantian to Tacoma = 15 days
 - Maersk's TPX: Shanghai to Seattle = 12 days



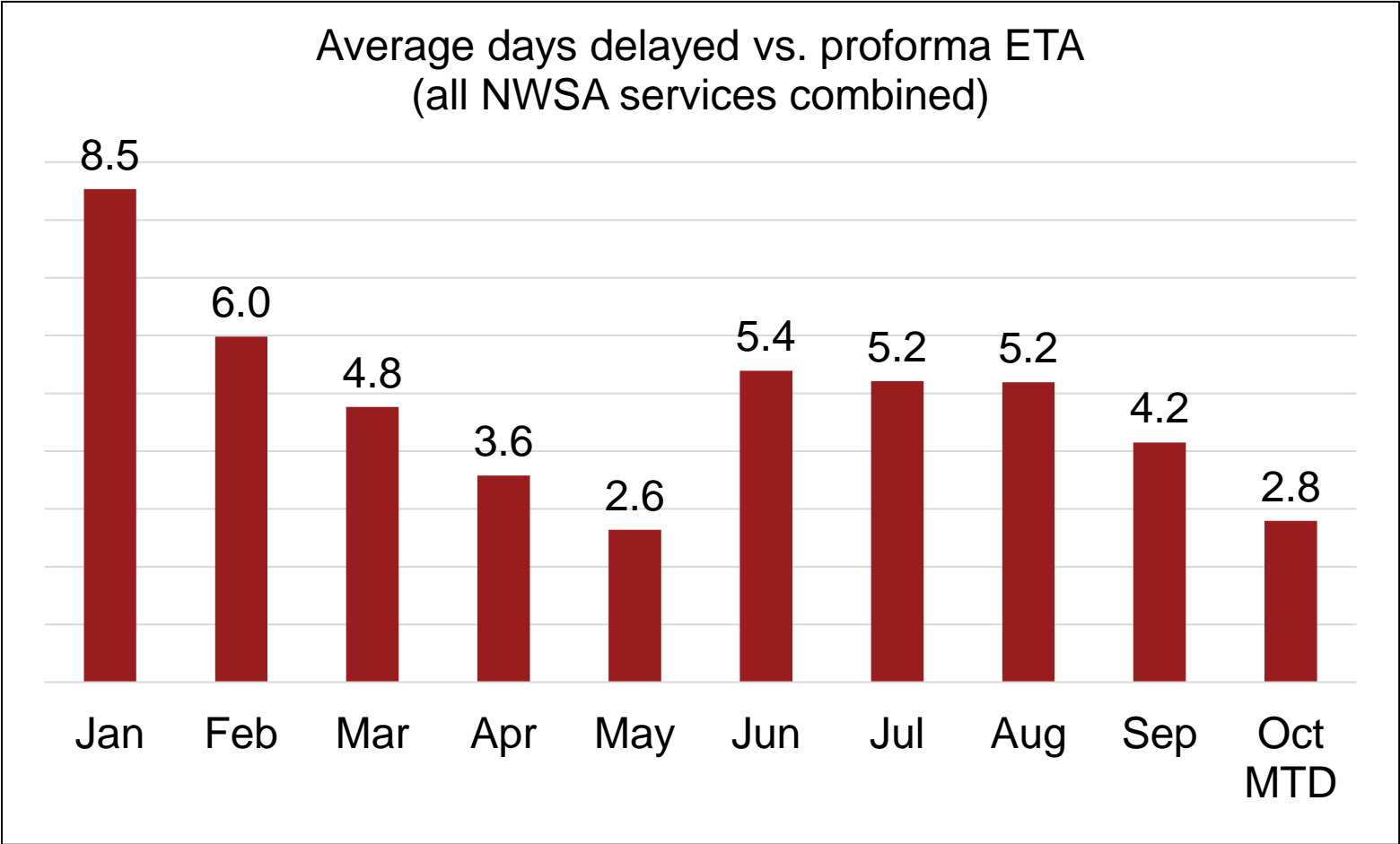
Voyage Frequency & Capacity Increasing



- Chart shows actual voyages vs. proforma Jan-Dec 2023
- Voyage frequency increased May-Sep, total capacity up 7% vs. 2022
- Winter deployment in effect from November: PN2/PN3 changes

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

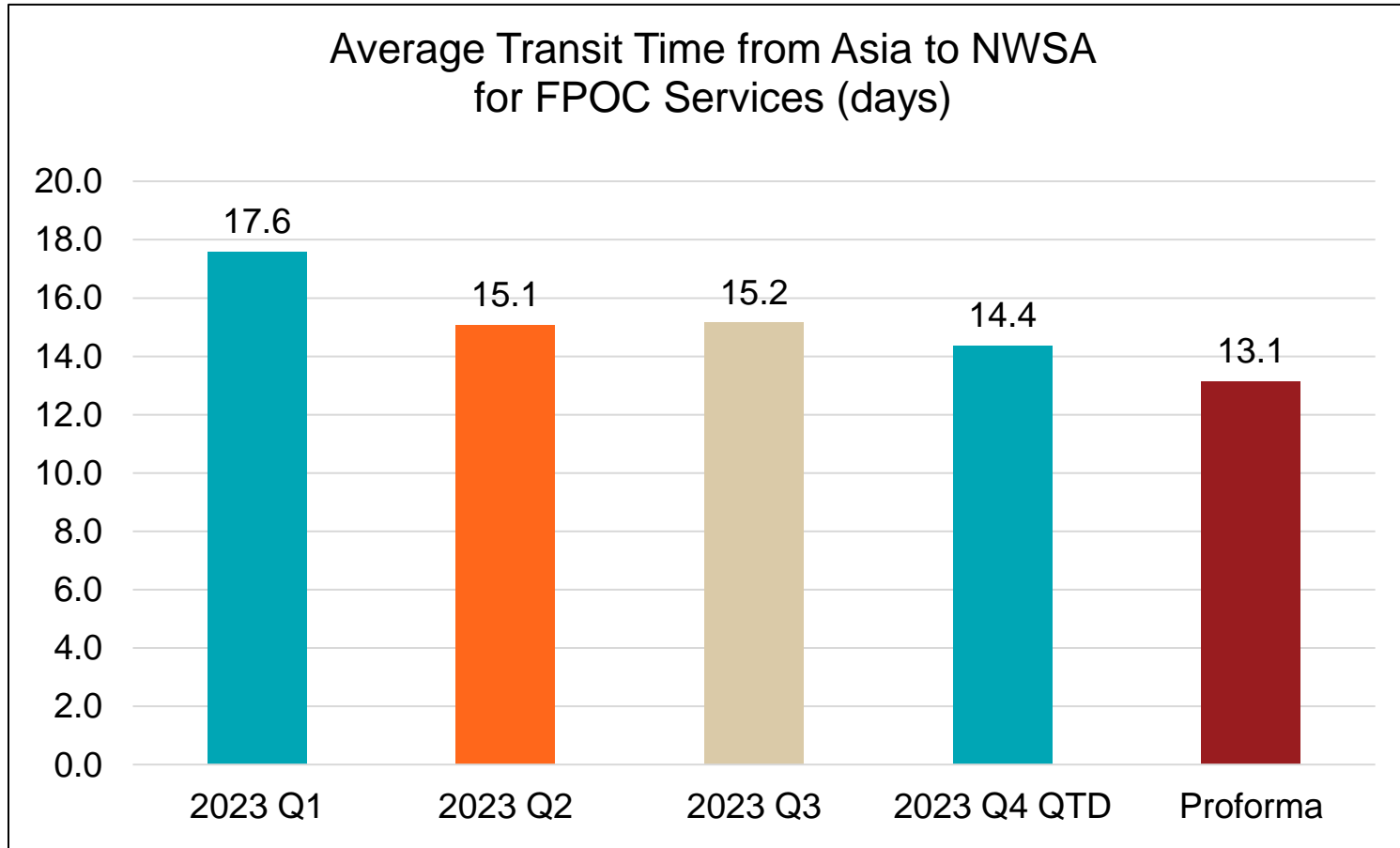
On Time Performance Improving



- Average days delayed vs. proforma ETA improved by 2-5 days vs. Q1
- June & July saw increases due to longer berth stays in early June and BC port closures in July
- Expecting continued schedule reliability improvement

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

First Port of Call (FPOC) Services Transit Time Improving



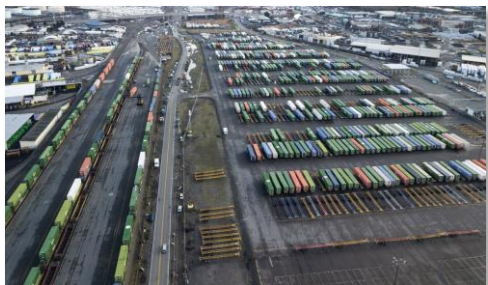
- Chart measures average transit time from last Asia port to first NWSA call
- Proforma transit (13.1 days) averages all 7 services' advertised transit time
- Faster transit time from Asia contributes to reduced inventory carrying cost
- Expecting continued schedule reliability improvement

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



Flexible: Landside Flexibility

NWSA is a full-service gateway with a range of facilities and service providers, including transload.



- IPI Rail Capacity
 - 13 different inland markets served by rail
 - #1 destination is Chicago
 - New Vietnam-Memphis dedicated train started in July
 - Consistently low dwell time overall
 - Additional capacity available with consistent railcar planning
- BCOs have the desired flexibility to move IPI & transload. More logistics options for BCOs to better compete and increase sales.
- Transload
 - 100+ transload & warehouse facilities
 - Added domestic rail capacity, both standard & expedited service
 - Landside costs can average 25% less than southern CA



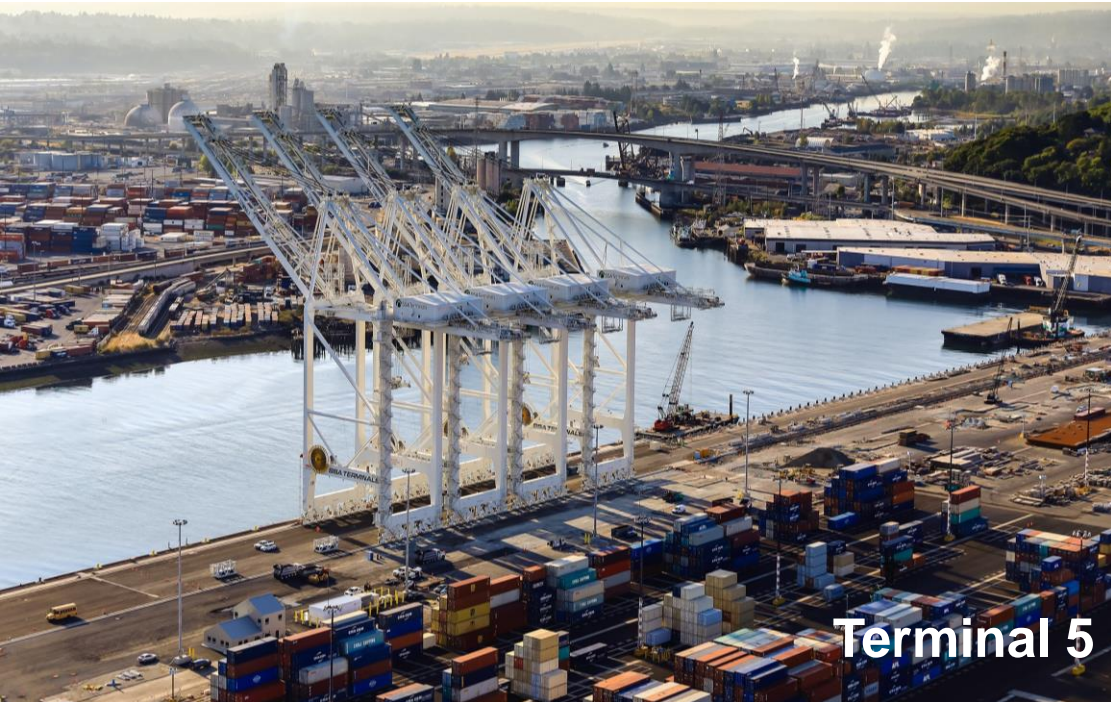
First Class: Customer Service & Increased Cargo Demand

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



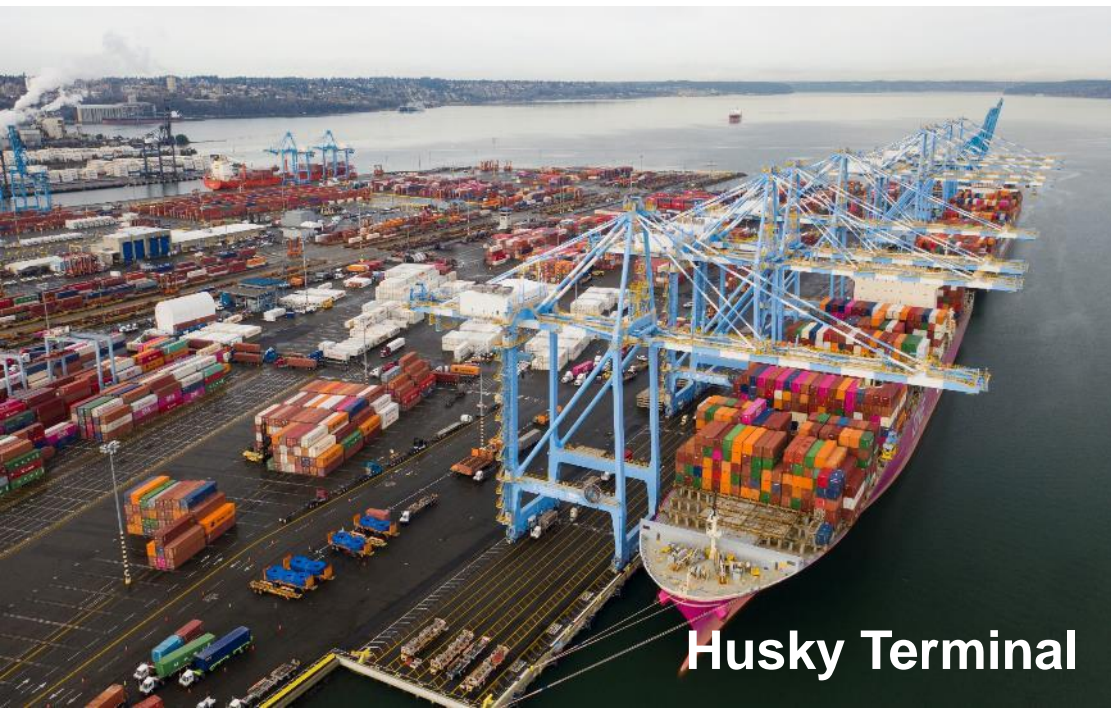


Terminal 5

Infrastructure Projects

Terminal 5 (Seattle)

- “Big Ship Ready”, on dock rail
- Phase 1 (north berth) reopened in Q1 2022
- Phase 2 (south berth) expected Q1 2024, additional reefer plugs planned
- Final annual TEU capacity: 1.2 million



Husky Terminal

Husky Terminal (Tacoma)

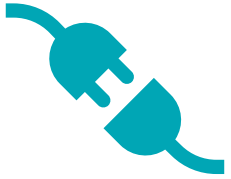
- Capacity expansion construction underway to increase terminal capacity and operational efficiency

Washington United Terminal (Tacoma)

- Two new super post-Panamax cranes arrived in June, operational within Q3



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](#).





Fast. Flexible. First Class.

- More NWSA terminal capacity coming online in 2023
- NWSA working with carriers to restore regular voyage frequency, schedule reliability
- Local logistics providers and rail yards have capacity to absorb more cargo
- ILWU/PMA contract was ratified, agreement through July 1, 2028
- Events
 - Quarterly Trucker Outreach Forums
 - The NWSA TPM Reception, March 5, 2024, Long Beach
 - Peak Planning Meeting, May 14, 2024, Seattle area



Thank You

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