

PMA Launches Internet Website

The Pacific Maritime Association introduced its Internet website in August 1996 at <http://www.pmanet.org> as a service to its member companies. Accessible with standard browsers such as Netscape Navigator® and Microsoft Internet Explorer®, the new website will also provide information to educational institutions and libraries, the press, and individuals interested in water-borne cargo transportation and labor relations in the Industry.

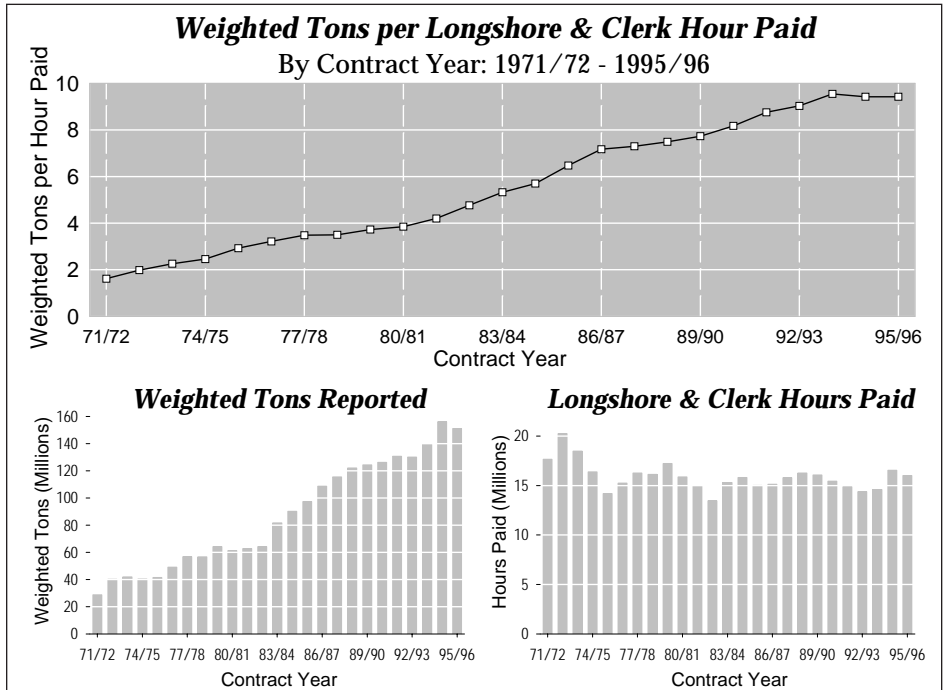
Changing and growing weekly, the site currently includes a listing of PMA member companies with links to their websites, the addresses and phone numbers at all of PMA's offices and training facilities, and tables of average weekly man-hours both by labor class and by PMA administrative area and monthly tonnage by cargo sector. The website also has a search engine to search for words and phrases and a feedback form for visitors to submit comments and suggestions to PMA. The first two pages of the three most recent issues of *PMA Update* are also available online.

Future additions will include, as Adobe Acrobat® files, the last several years of *PMA Update*, the 1995 *PMA Annual Report*, the 1996 Revision of the *Pacific Coast Marine Safety Code*, and the new longshore and clerks' labor contract documents, when available. Adobe Acrobat files are fully searchable, and they can be printed to reproduce the original document. The Acrobat file reader is free, and it can be downloaded from <http://w1000.mv.us.adobe.com/acrobat/main.html>. Current versions of Navigator and Internet Explorer include the "plug-in" for Adobe Acrobat.

Currently, the PMA website is being hosted offsite by AT&T. However, it will soon be moved to an in-house server so that PMA can add additional features, such as increased security restricting access to certain information only to PMA member companies. The website address will not change when the site is moved.

Comments and suggestions regarding the website can be submitted via electronic mail to d.dayan@worldnet.att.net or to PMA Research, P.O. Box 7861, San Francisco, CA 94120-7861.

Productivity Climb Stalls Out



PMA has traditionally measured longshore productivity by the number of tons of cargo moved for each hour paid. Using this measure, productivity in 1972/73 was 1.987 weighted tons per man-hour, and it increased regularly to a peak of 9.55 tons for every longshore and clerk man-hour paid in contract year 1993/94. After dropping back to 9.43 tons per hour in 1994/95, it remained nearly flat in 1995/96. (See the chart titled *Weighted Tons per Longshore & Clerk Hour Paid*, above.)

This two-year break in growth exhibits a sharp contrast to the pattern of increases in productivity which was the norm before 1994/95. The increase in productivity experienced prior to 1994/95 corresponds to the Industry's huge capital investment in vessels and marine cargo terminals, which continued past 1994 and is expected to continue into the foreseeable future.

The productivity data shown on the chart above was calculated by dividing all longshore and clerk man-hours, excluding travel hours, into the total weighted tonnage. Weighted tonnage is the sum of the following:

- Containerized tonnage calculated by multiplying reported TEUs by 17,
- Autos & Trucks tonnage calculated

based on 40 cubic feet to the ton,

- Lumber & Logs tonnage based on 1,000 board feet to a ton,
- General Cargo tons as manifested, and
- Weighted Bulk tonnage calculated by dividing reported short tons by 50.

The two smaller charts, above, show the total weighted tonnage by contract year and the total hours paid at longshore and clerk occupation codes in each contract year.

Annual Percentage Changes

The patterns of change in weighted tonnage and in longshore and clerk man-hours are shown in the three graphs at the top of page 2. On the first graph, the percentage change in weighted tonnage and hours between each contract year in the period is shown. The solid line plots the annual changes in weighted tonnage, and the dotted line plots annual changes in hours paid.

The second graph in the series shows the accumulated percentage changes in each succeeding year for the weighted tonnage and man-hours, and it illustrates how man-hours have remained at about the same level for the last 23 years while tonnage has increased on a relatively continual basis.

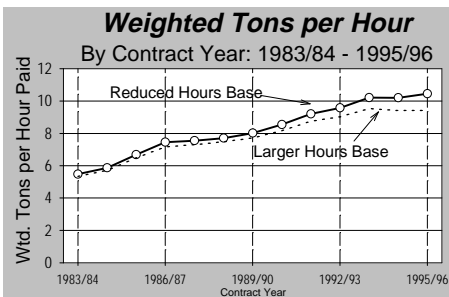
The next chart, titled *Weighted Tons per Hour Paid: % Change from Previous Year*, shows the annual percentage change in pro-

ductivity by contract year. During the last 23 years, the trend shown is one of a gradual reduction in productivity gains, with a move into negative territory in 1994/95.

Reducing the Hours Base

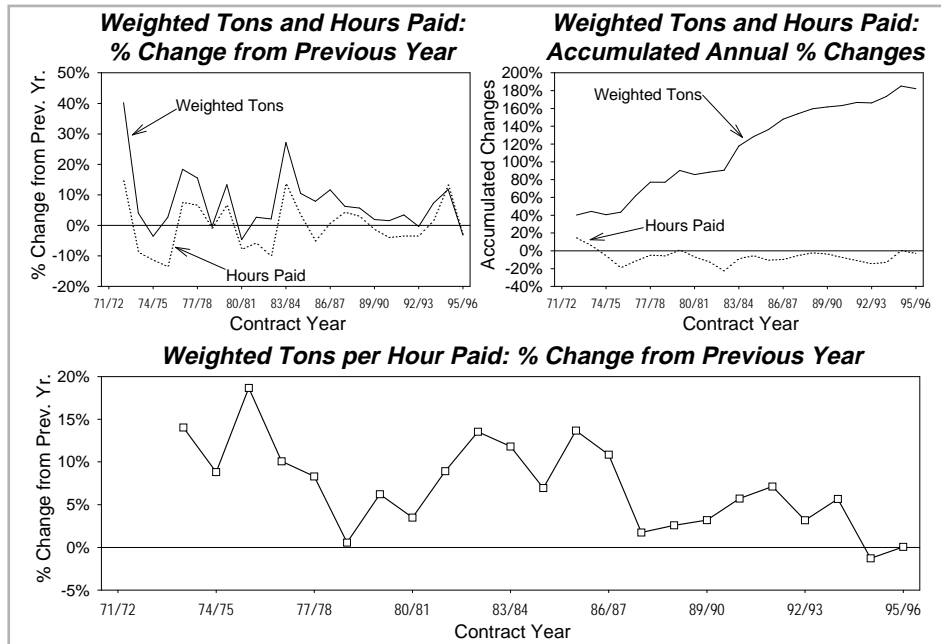
Defining the components for a consistent measure of productivity is a challenge. The values described above were based on all hours paid at all longshore and clerk occupation categories, but not all companies use the longshore work force for several of the occupation categories included. Thus, as more employers use the longshore work force to fill mechanics jobs, for example, the effect of these occupations on productivity values is correspondingly inconstant.

These occupations include ILWU mechanics, grain elevator jobs in the Pacific Northwest, and occupations covered by several local area warehouse agreements. The values discussed below were calculated using a reduced hours base which excludes the hours paid at these occupations.



The chart above demonstrates, for a twelve year period, the effect on productivity values of applying a lesser hours base. The data for the alternative hours base include all longshore and clerk man-hours paid since contract year 1983/84 except those occupations described in the paragraph above. Productivity calculated using the reduced base is, of course, slightly higher in 1983—5.48 compared with 5.33 using the larger hours base—, but the difference in 1995/96 is greater: using the reduced hours base, productivity is 10.46 weighted tons per hour as compared to 9.43 with the larger base.

CONSUMER PRICE INDEX U.S. CITY AVERAGE - ALL ITEMS (1982-84 = 100)				
Urban Wage Earners & Clerical Workers				
Month	1994	1995	1996	12 Mo.
JAN	143.6	147.8	151.7	2.64%
FEB	144.0	148.3	152.2	2.63
MAR	144.4	148.7	152.9	2.82
APR	144.7	149.3	153.6	2.88
MAY	144.9	149.6	154.0	2.94
JUN	145.4	149.9	154.1	2.80
JUL	145.8	149.9	154.3	2.94
AUG	146.5	150.2	154.5	2.86
SEP	146.9	150.6	155.1	2.99
OCT	147.0	151.0		2.72
NOV	147.3	150.9		2.44
DEC	147.2	150.9		2.51



The change in annual productivity gain, however, is still apparent using the reduced hours base. Even though there was not a negative change between 1993/94 and 1994/95, the last two contract years still have not had the increases in productivity seen in previous periods.

This argues that the additional hours have not caused the reduction in productivity improvements over the recent past.

Productivity by Area

The four charts to the left show productivity values by PMA Administrative Area by contract year from 1983/84 to 1995/96. The data plotted in these graphs use the reduced hours base described above.

Two graphs are shown on each chart: one plots annual productivity calculated using weighted tonnage data, and the other plots annual productivity calculated based on total tons—i.e., bulk tonnage has not been reduced to one-fiftieth.

The two graphs for both Southern and Northern California are consistently parallel throughout the period shown. However, the two different measures of productivity in the Washington Area are less closely matched than the California Areas, and in the case of the Oregon Area, the two measures are very different.

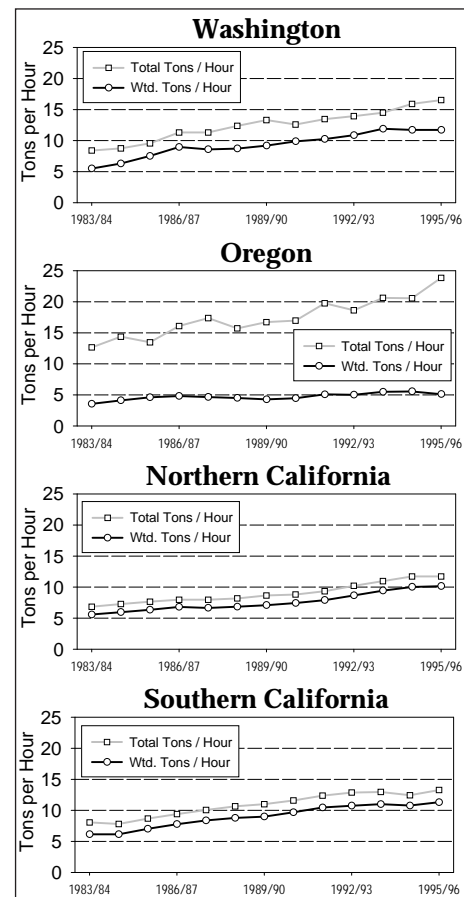
These differences may be attributed almost completely to the amount of bulk tonnage handled in each Area as a percent of the total tonnage reported. In calendar year 1995, nearly 80% of Oregon's total tonnage was bulk cargo. By contrast, the California Areas each had less than 15% reported as bulk.

The table shows the weighted tonnage productivity values by Area at the begin-

ning and end of the period with the total percentage changes and annual cumulative percentage changes in these values.

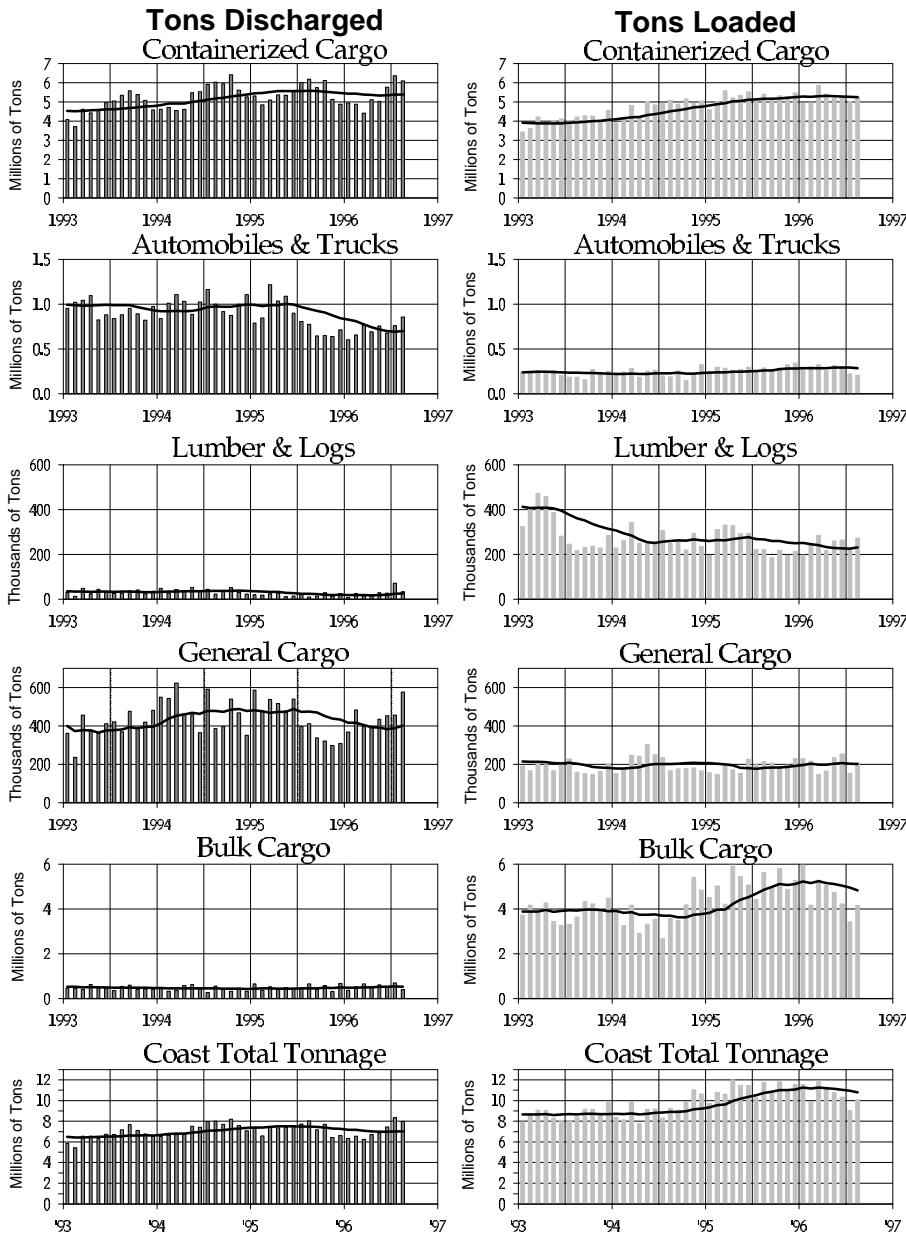
Wtd. Tons per L/S & Clerk Hour Paid

Area	Productivity in 1983/84	Productivity in 1995/96	% Incr. (12 Yrs.)	Annual Cumul. %
Washington	5.52	11.74	+112.6%	+6.5%
Oregon	3.58	5.13	+ 43.3%	+3.0%
No. Cal.	5.57	10.14	+ 82.1%	+5.1%
So. Cal.	6.15	11.31	+ 83.8%	+5.2%
COAST	5.48	10.46	+ 90.8%	+5.5%



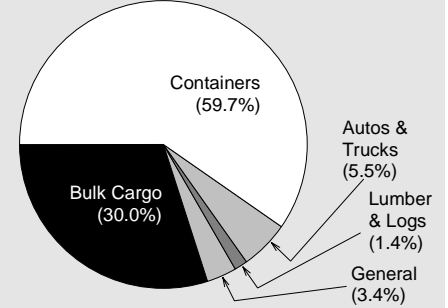
Monthly Tonnage by Reporting Category: Discharged vs. Loaded

Actual Tons Reported by Month

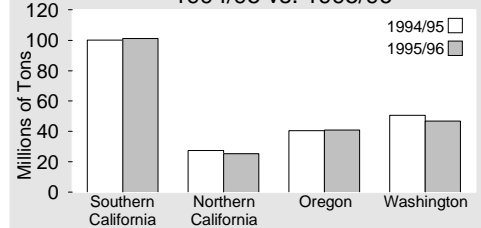


In the Tonnage graphs above, bars represent monthly totals, and the lines show 12-month moving averages.

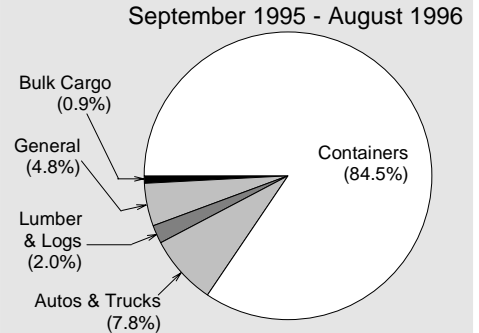
Coast Total Tonnage By Reporting Category September 1995 - August 1996



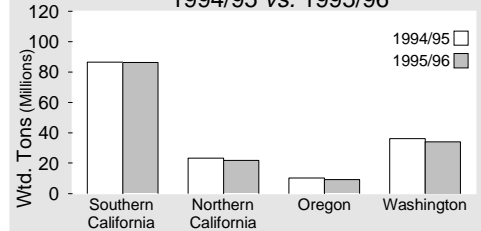
By Area 12 Months ending August 1994/95 vs. 1995/96



Coast Weighted Tonnage By Reporting Category September 1995 - August 1996



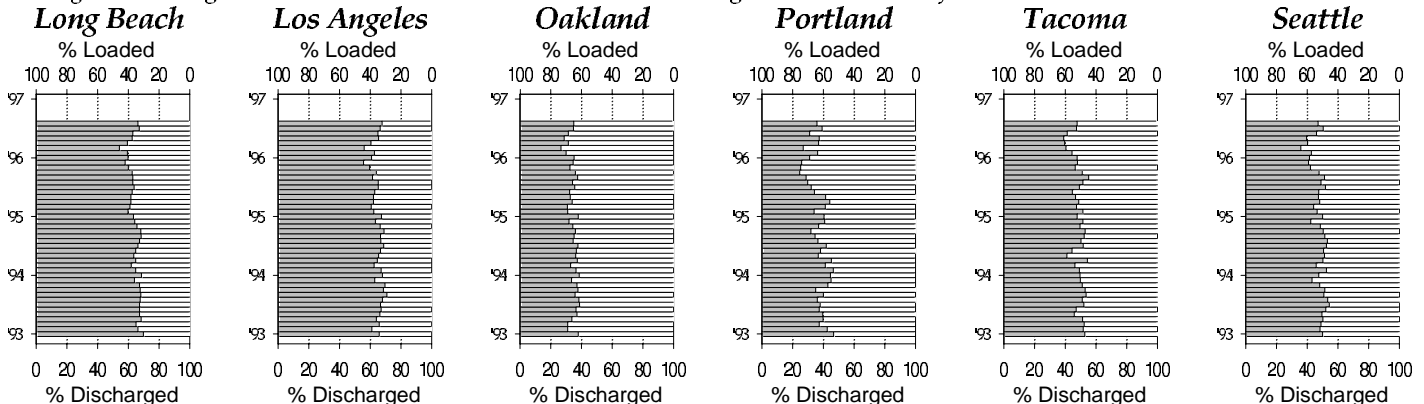
By Port: 12 Months ending June 1994/95 vs. 1995/96



"Weighted" Tonnage: % Discharged vs. % Loaded

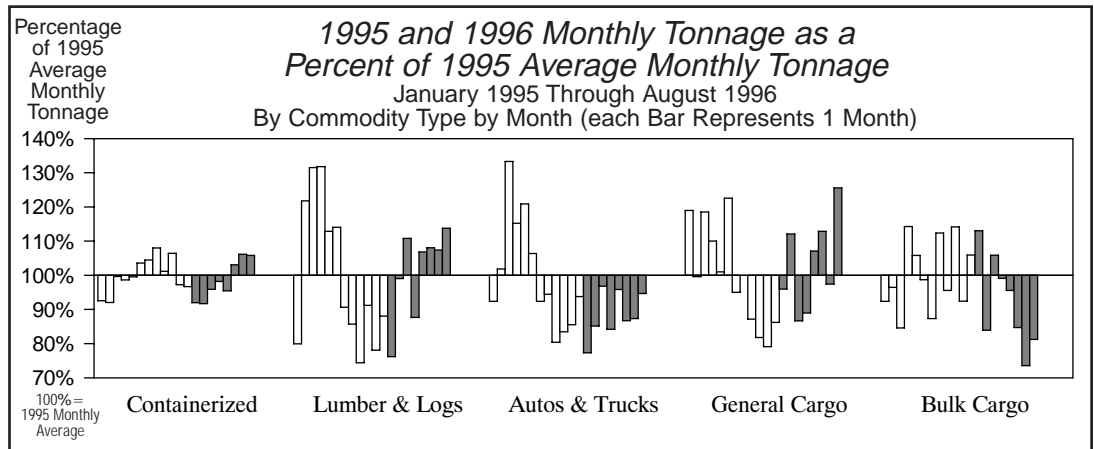
("Weighted" Tonnage = Containerized + Autos & Trucks + Lumber & Logs + General + 1/50 of Bulk)

% Discharged | % Loaded



ILWU LOCAL/PORT AREA	REGISTRATION		STATS (For 52 Payroll Weeks)							PORT HOURS (Year-to-date)					TONNAGE BY PORT AREA (For 12 months-to-date & YTD)									
	(At 9/30/96)		(Ending 9/28/96)		Hours Paid:					Hours Paid at					% of Category Coast Total (12 Months-to-Date)					% of 1996 YTD				
	TOTAL	Class "B"	Number Working	Annual Hrs Pd	Wkly PGP	Out of Port	Other Local	Casuals	Inactives	P/R Wks 1-40, '96	Avg. Wkly HRS	% Cst	Occ Codes Clk	Frm	Exp. Rates*	Cont'r RU's	Lmbr Logs	Autos Trucks	Other Gen'l	Bulk Cargo	TOTAL	1996 YTD (Jan-Aug)	% of Coast Total	'96 as a % of '95
NO.	NO.	NO.	HRS	\$	%	%	%	%	HRS	%	%	%	%	%	%	%	%	%	%	%	TONS	%	%	TONS
Longshoremen																								
<i>Southern California</i>																								
29 San Diego	42	0	41	1,524	16	4.0	7.8	26.8	3.1	1,952	0.6	11.4	13.5	17.8	0.1	2.3	1.5	1.1	1.2	0.6	832,091	0.6	114.4	0
13 Los Angeles/Long Beach	3,010	751	2,966	1,942	< 1	0.5	3.1	6.8	0.4	179,148	52.3	24.9	9.1	15.3	58.7	4.1	43.4	50.3	22.3	45.9	66,538,487	47.1	102.5	35,394
46 Port Hueneme	85	11	85	1,949	1	6.6	7.9	24.5	0.0	5,190	1.5	13.9	6.0	22.7	< 0.1	< 0.1	8.4	9.7	-	0.8	1,227,672	0.9	83.8	0
Southern California Total	3,137	762	3,092	1,937	< 1	0.7	3.4	7.6	0.4	186,290	54.4	24.5	9.0	15.5	58.8	6.4	53.3	61.1	23.6	47.2	68,598,250	48.6	102.2	35,394
<i>Northern California</i>																								
10 San Francisco Bay Area	902	89	841	1,669	2	1.3	0.4	3.0	2.9	42,743	12.5	28.3	7.8	6.8	14.9	0.1	14.0	7.1	1.3	10.3	14,321,134	10.1	91.4	66,184
54 Stockton	54	6	53	1,860	50	1.0	12.8	21.3	2.3	3,005	0.9	9.5	5.7	9.5	< 0.1	< 0.1	-	1.6	2.4	0.8	1,152,067	0.8	81.2	0
18 Sacramento	30	15	30	1,538	147	17.4	17.5	18.7	2.5	1,536	0.4	21.9	6.5	12.6	< 0.1	0.4	< 0.1	2.3	1.2	0.4	675,447	0.5	97.3	0
14 Eureka	34	1	34	1,052	257	42.8	3.4	3.7	0.3	528	0.2	12.1	9.7	3.8	-	1.3	-	2.7	0.5	0.3	344,767	0.2	87.8	23,878
Northern California Total	1,020	111	958	1,654	19	2.7	2.2	5.3	2.8	47,811	14.0	26.7	7.7	7.1	14.9	1.8	14.0	13.7	5.5	11.8	16,493,415	11.7	90.8	90,062
<i>Oregon</i>																								
12 North Bend/Coos Bay	103	7	98	1,561	36	10.7	19.8	9.1	1.8	4,404	1.3	8.4	6.9	7.3	< 0.1	12.8	< 0.1	1.2	5.1	1.8	2,395,452	1.7	101.7	1,547
53 Newport	8	0	8	1,029	321	79.0	49.1	1.2	0.0	70	0.0	8.3	4.4	2.8	-	0.4	-	-	-	< 0.1	8,628	0.0	303.9	0
50 Astoria	57	0	57	810	329	75.5	7.7	2.2	5.4	267	0.1	4.0	4.4	3.1	-	0.7	-	-	-	< 0.1	15,471	0.0	38.7	0
8 Portland	472	100	463	1,815	5	3.0	8.4	5.3	1.1	21,763	6.4	14.0	7.0	5.7	3.0	3.0	16.9	3.0	20.0	8.9	11,448,156	8.1	95.4	30,142
4 Vancouver, WA	149	44	149	1,905	3	10.0	9.8	6.7	0.9	7,072	2.1	14.1	6.4	16.7	< 0.1	2.4	1.2	4.0	7.7	2.5	3,195,186	2.3	103.2	0
21 Longview, WA	205	27	200	1,959	9	10.2	6.4	6.1	4.5	9,387	2.7	9.0	8.1	7.4	< 0.1	26.4	-	5.5	17.8	5.9	7,730,419	5.5	77.3	31,225
Oregon Total	994	178	975	1,768	30	8.8	9.5	6.0	1.9	42,963	12.5	12.3	7.1	8.0	3.1	45.7	18.1	13.7	50.6	19.1	24,793,312	17.6	90.2	62,914
<i>Washington</i>																								
24 Aberdeen	89	0	88	1,375	108	19.3	14.7	7.0	0.0	2,778	0.8	5.3	8.0	0.9	< 0.1	16.6	-	1.0	-	0.3	428,410	0.3	103.5	34,077
27 Port Angeles	58	0	57	1,149	283	58.0	5.0	2.5	0.0	736	0.2	10.2	8.0	1.3	-	3.2	-	-	0.5	0.2	280,401	0.2	178.3	21,910
51 Port Gamble	13	0	13	777	443	85.5	18.6	1.7	0.0	37	0.0	2.7	4.2	3.2	-	-	-	< 0.1	-	< 0.1	2,706	0.0	65.4	0
47 Olympia	22	0	22	906	313	32.8	40.5	6.0	1.0	570	0.2	4.2	13.4	2.8	-	1.8	-	-	-	< 0.1	47,749	0.0	110.8	0
23 Tacoma	453	70	447	1,955	< 1	1.8	3.5	13.6	0.5	26,017	7.6	21.4	8.9	4.6	9.9	16.8	10.7	2.9	10.5	10.0	14,900,411	10.6	94.1	0
19 Seattle	586	163	575	1,796	< 1	2.6	3.6	9.3	0.4	31,504	9.2	27.2	8.1	10.0	13.4	0.5	3.9	5.0	6.7	10.4	14,234,320	10.1	84.8	34,952
32 Everett	68	0	65	1,448	154	18.6	9.8	10.5	1.8	1,943	0.6	7.1	7.7	5.6	< 0.1	6.5	-	0.4	0.6	0.3	429,706	0.3	97.4	2,622
25 Anacortes	13	0	13	1,277	187	45.7	37.0	3.9	0.0	365	0.1	10.4	9.5	4.3	-	0.6	-	-	0.5	0.1	196,123	0.1	74.6	0
7 Bellingham	32	4	32	1,540	52	9.6	23.3	9.9	0.0	1,525	0.4	7.8	9.4	11.1	< 0.1	0.1	-	2.2	1.6	0.6	792,862	0.6	107.9	923
Washington Total	1,334	237	1,312	1,740	40	6.6	5.5	10.8	0.5	65,475	19.1	22.4	8.5	7.2	23.2	46.1	14.6	11.4	20.3	21.8	31,312,688	22.2	90.3	94,484
Total/Average	6,485	1,288	6,337	1,827	16	3.3	4.5	7.7	1.0	342,539	100.0	22.9	8.5	11.8	100.0	100.0	100.0	100.0	100.0	100.0	141,197,665	100.0	95.8	282,854
% Change from Update of 10/95	+3.2	+47.0	+3.1	+0.1	+23.1	-0.7	0.0	-4.8	-0.2	-1.3	+0.1	-0.2	-0.5	-1.0%	-11.8%	-18.4%	-7.8%	0.6%	-2.1%					-4.2%

Clerks																								
29 San Diego	5	0	5	1,739	10	17.5	41.1	5.5	1.2															
46 Port Hueneme	12	0	12	2,373	< 1	4.0	30.8	4.5	0.0															
63 Los Angeles/Long Beach	790	3	780	2,645	< 1	0.1	10.2	4.8	0.5															
14 Eureka	3	0	3	***	***	14.0	38.9	0.0	0.0															
30 SF Bay Area & Delta	278	4	268	2,342	2	2.9	4.4	1.0	1.4															
40 Portland	110	0	109	2,321	< 1	35.3	6.3	1.9	3.4															
23 Tacoma	60	0	59	2,625	-	0.0	43.7	2.9	0.0															
52 Seattle	172	2	171	2,681	< 1	16.1	10.2	3.9	0.0															
Total/Average	1,430	9	1,407	2,557	1	5.2	11.6	3.7	0.7															
Foremen/Walking Bosses																								
29 San Diego	2	0	2	***	***	0.0	70.9	0.4	1.3															
46 Port Hueneme	6	-	6	2,101	36	1.0	22.0	0.0	0.0															
94 Los Angeles/Long Beach	290	-	288	2,876	< 1	0.2	5.0	0.0	3.2															
91 Northern Calif. Area	77	-	76	2,337	37	0.2	7.2	0.0	1.4															
92 Portland	51	-	50	2,593	14	12.1	14.8	0.0	7.0															
98 Seattle	97	-	97	2,621	9	10.2	11.7	0.0	1.3															
Total/Average	523	-	519	2,709	9	3.1	8.3	0.0	3.0															



* Longshore and Clerk hours only. *** "Annual Hrs Pd" and "Wkly PGP" for groups of less than five individuals are not shown, but the data are included in category averages.