

Container TEUs Reported by Month in the Five Major West Coast Container Ports: January through April 1993-1997

The six sets of graphs to the right represent the number of container TEUs reported to PMA by month since January 1993. A TEU (twenty-foot equivalent unit) is the common measure of container size and is the equivalent of 20 feet of exterior container length. One set of graphs is shown for the West Coast total TEU counts, and a separate set is provided for each of the five major container ports on the Coast.

The **vertical** bar chart in each set of graphs shows the total TEUs reported, by month, from January 1993 through April 1997. The darker bars represent TEUs reported in each year from January through April. The line near the tops of the bars represents their 12-month running averages.

The **horizontal** bar graph in each set shows the cumulative TEUs reported for the period January to April of each year from 1993 through 1997.

The number of TEUs reported on the West Coast continues to increase. Container TEUs reported for Los Angeles and for Long Beach, in particular, show sizeable increases since 1993. The recent trend (since mid-1995) in the Ports of Seattle, Oakland and Tacoma has been either no growth or a declining TEU count.

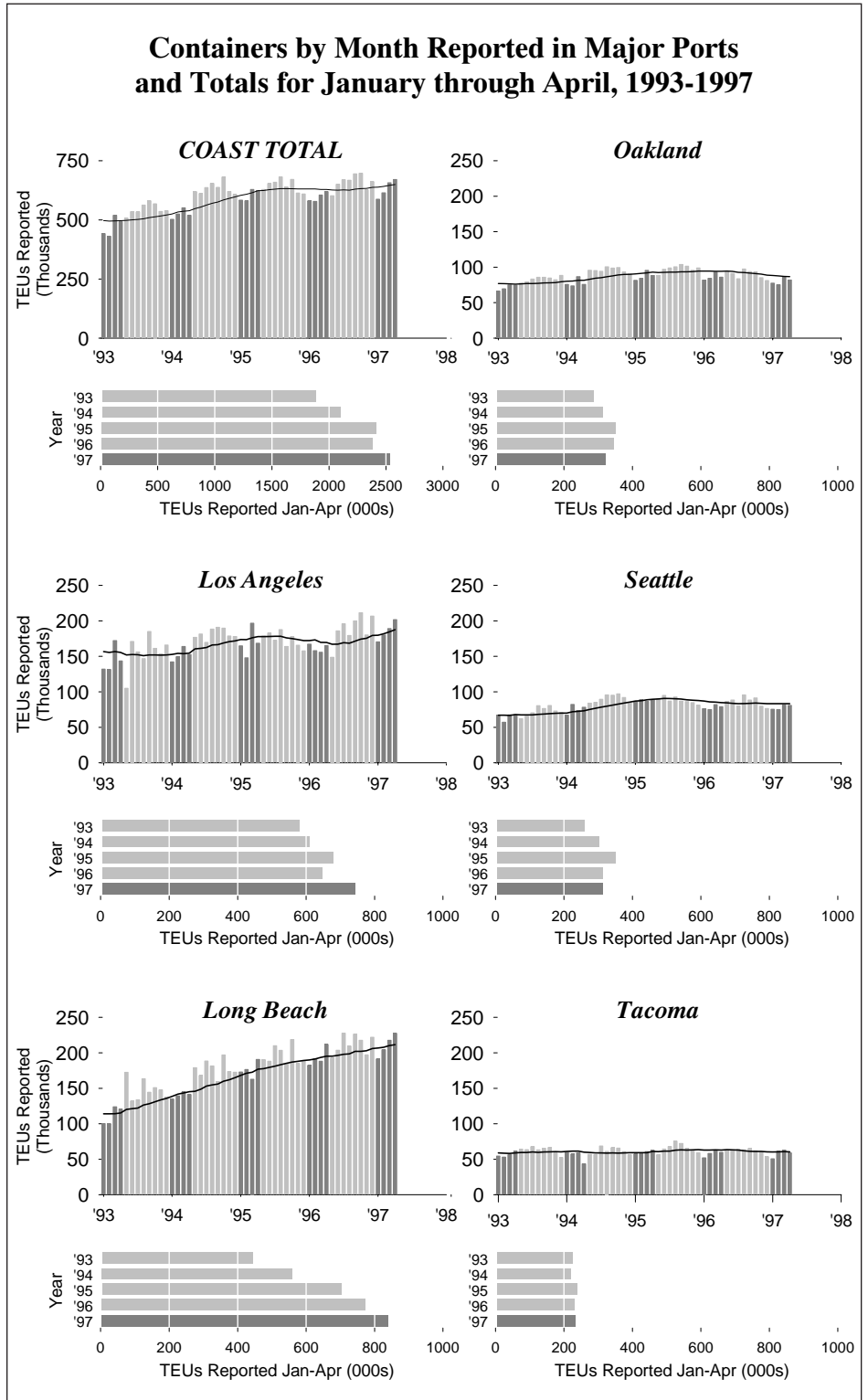
The total TEUs reported coastwise for the first four months of 1997 (January through April) increased by 6% from the previous year. The horizontal bar graphs demonstrate clearly that this growth is almost entirely driven by the increases in the two major Southern California ports.

Reported TEUs in Long Beach (as measured by twelve month running averages) have grown from about 114 thousand per month in January 1993 to 211 thousand in April 1997, an increase of 85.6%. Los Angeles has experienced an equivalent boost from 157 thousand to 188 thousand, or 19.6%. The combined growth for the two adjacent ports was 47.4%.

In contrast, Oakland has seen a 12.7% growth over the 52 month period, but its current monthly average of about 86.9 thousand is 8.3% below its peak of 94.7 thousand in January 1996.

Seattle has posted a 24.7% increase in twelve month averages since the beginning

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Preparing for Tomorrow Today

Joseph Miniace, President and CEO of PMA, addressed the challenges PMA will face in the future and outlined his solutions in an article written for *World Wide Shipping* (June 1997, Vol. 60 No. 4).

Mr. Miniace tells about his first ILWU-PMA negotiations in 1996. While he was assured by the bargaining committee that what happened during the 1996 labor contract negotiations wasn't normal, Mr. Miniace saw that what happened "is a symptom of the challenges that have lain dormant for a long time and that we will continue to face."

The West Coast Maritime Industry must address the potential efficiencies and dollars at risk in order for it to stay competitive. Mr. Miniace set his vision for the future. "My goal is to have the PMA recognized as the best labor relations support group in the world and for PMA to be perceived by you [the member companies and stakeholders] as an instrument for effectively changing and bringing efficiencies to the waterfront on the West Coast."

The ILWU and PMA must work together to achieve the employers' objectives of growth and productivity and the ILWU's goal of job security.

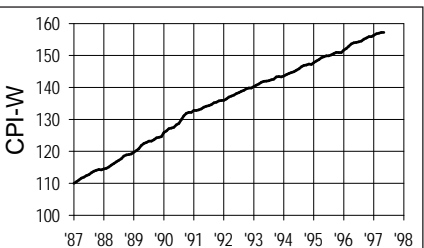
Mr. Miniace concludes, "We must increase communications, we must align our interest, we must effect efficiencies, and we must educate the ILWU and ourselves."

The full text of Mr. Miniace's article is also available on the Internet at http://www.pmanet.org/miniace_article.htm.

CONSUMER PRICE INDEX U.S. CITY AVERAGE - ALL ITEMS (1982-84 = 100)

Urban Wage Earners & Clerical Workers

Month	1995	1996	1997	12 Mo.
JAN	147.8	151.7	156.3	3.03%
FEB	148.3	152.2	156.8	3.02
MAR	148.7	152.9	157.0	2.68
APR	149.3	153.6	157.2	2.34
MAY	149.6	154.0	157.2	2.08
JUN	149.9	154.1		2.80
JUL	149.9	154.3		2.94
AUG	150.2	154.5		2.86
SEP	150.6	155.1		2.99
OCT	151.0	155.5		2.98
NOV	150.9	155.9		3.31
DEC	150.9	155.9		3.31



TEUs

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of 1993, but the April 1997 average is 8.2% below its peak in June 1995.

Tacoma has seen the smallest amount of growth during the 52 months studied, about 2.8%, and the April 1997 average of 60.5 thousand TEUs per month is about 2.9 thousand, or 0.45%, below its peak in May 1996. The two Puget Sound ports combined have shown a 14.4% increase in the monthly average TEU count since January 1993.

Although each of the port areas studied

has shown at least some growth in the past four years, only the two Southern California ports have increased in TEU counts over the past two years.

This reduction in containerized cargo through the Northern California and Washington ports in the recent past does not bode well for the work opportunity outlook in these areas. The sustained growth in work opportunity seen in Southern California is not being shared with the other major port areas on the West Coast.

New Additions to the PMA Website



The PMA website at www.pmanet.org has been updated and now includes all the ILWU-PMA Contract Documents and the Pacific Coast Marine Safety Code. These documents can be viewed in Adobe® Acrobat format or downloaded as Microsoft® Word documents.

Microsoft Word 6.0 (Mac) or MS Word for Windows95 must be installed in the computer in order to view these files. While the body of the text in these files is similar to the actual printed documents, pagination will differ. These Word documents do not contain an index.

The PMA Assessment Rates for 1996/97 and for 1997/98 have also been added to the site. The rates for 1997/98 can also be viewed in Acrobat format. (See story on *PMA Assessment Rates*.)

Member company employees with user names and passwords will soon be able to have access to the man-hour and tonnage databases. Additionally, member companies in at least one port area will be able to submit manpower allocations requests via the Internet.

Another improvement to the site is the addition of a search page which allows the visitor to search the entire website for a particular word or phrase. At present, however, the search engine still cannot scan Adobe Acrobat files.

Comments and suggestions regarding the website can be submitted via e-mail to darwin@pmanet.org or to PMA Research, P.O. Box 7861, San Francisco, CA 94120.

Assessment Rates for 1997/98

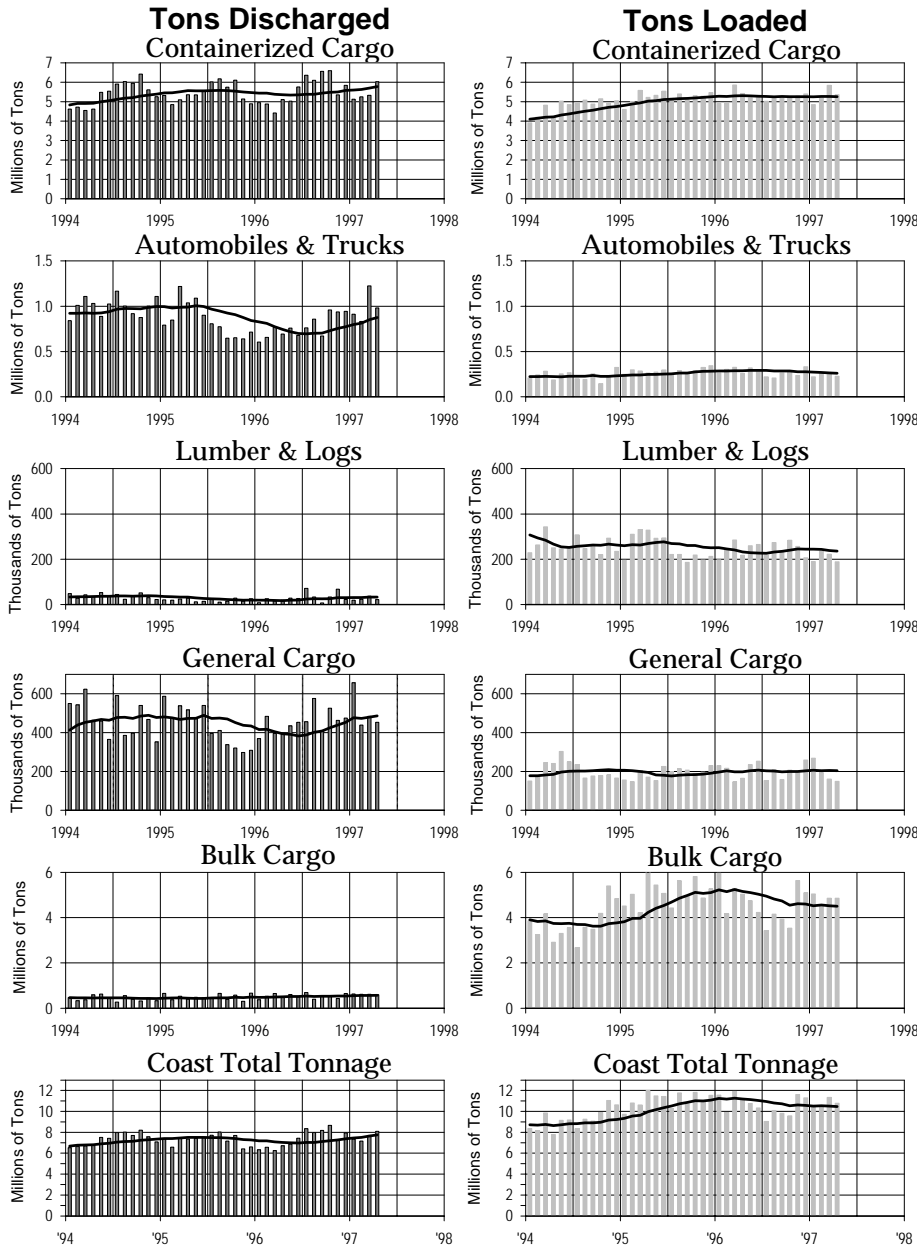
The Coast Executive Committee approved the 1997/98 Benefits rates shown to the right on June 4, and the Board of Directors approved the 1997/98 PMA Cargo Dues rates on June 18. Also shown are the most recent rate projections for 1998/99 and 1999/00.

A detailed listing of the new assessment rates is available on the Internet in the **What's New** Section of the PMA website. The rates are available either in regular webpage format or as an Adobe Acrobat file.

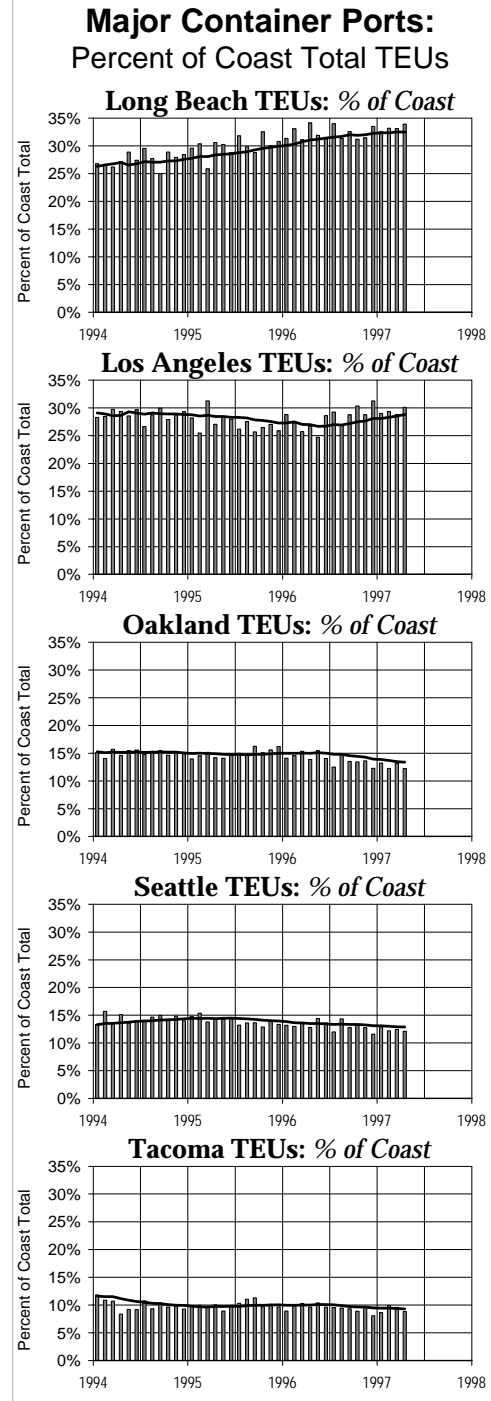
	Man-Hours	TEUs	General Cargo	Bulk Cargo
1997/98 Rates (Actual)				
Benefits	\$11.53	\$ 9.98	\$0.587	\$0.012
Cargo Dues	0.32	2.99	0.176	0.004
CFS		0.10		
Total	\$11.85	\$13.07	\$0.763	\$0.016
1998/99 (Projected)				
Benefits	\$12.55	\$10.35	\$0.620	\$0.012
Cargo Dues	0.32	2.99	0.176	0.004
CFS		0.41		
Total	\$12.87	\$13.94	\$0.796	\$0.016
1999/00 (Projected)				
Benefits	\$12.85	\$10.35	\$0.609	\$0.012
Cargo Dues	0.32	2.99	0.176	0.004
CFS		0.39		
Total	\$13.17	\$13.73	\$0.785	\$0.016

Monthly Tonnage by Reporting Category: Discharged vs. Loaded

Actual Tons Reported by Month



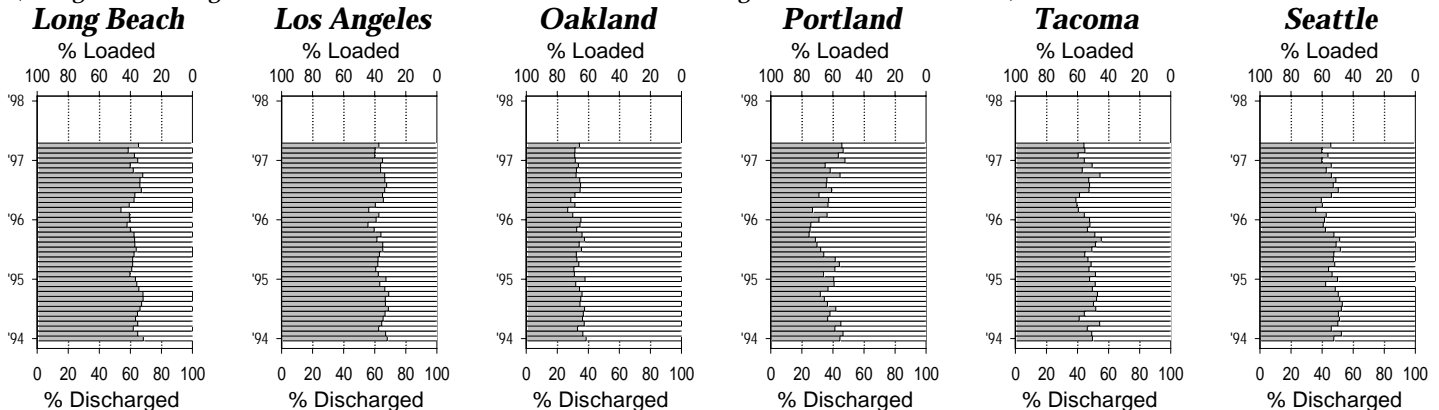
In the Tonnage graphs above, bars represent monthly totals, and the lines show 12-month moving averages.



"Weighted" Tonnage: % Discharged vs. % Loaded

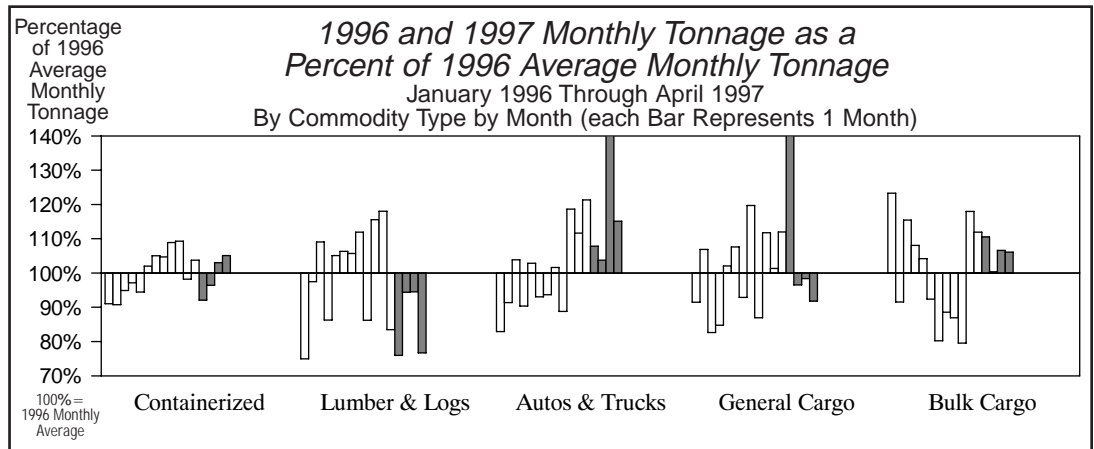
("Weighted" Tonnage = Containerized + Autos & Trucks + Lumber & Logs + General + 1/50 of Bulk)

% 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 6/4/97)		(Ending 5/31/97)		Hours Paid:					Hours Paid at					% of Category Coast Total (12 Months-to-Date)					% of 1997 YTD				
	Class	Number	Annual	Wkly	Out of	Other	Cas-	Inac-	P/R	Wks	1-23, '97	Occ	Codes	Exp.	Cont'r	Lmbr	Autos	Other	Bulk	1997 YTD	Coast	'97 as a	Cstwise	
TOTAL	"B"	Working	Hrs Pd	PGP	Port	Local	uals	tives	Avg. Wkly	% Cst	Clk	Frm	Rates*	RU's	Logs	Trucks	Gen'l	Cargo	TOTAL	(Jan-Apr)	Total	% of '96	Loaded	
NO.	NO.	NO.	HRS	\$	%	%	%	%	HRS	%	%	%	%	%	%	%	%	%	%	TONS	%	%	TONS	
Longshoremen																								
Southern California																								
29 San Diego	56	14	55	1,422	10	6.4	6.6	31.4	0.3	2,636	0.7	11.0	12.1	27.3	0.1	2.1	5.9	1.1	1.2	0.8	808,997	1.1	166.6	0
13 Los Angeles/Long Beach	3,231	746	3,174	1,953	< 1	0.2	2.1	11.1	0.8	200,643	55.1	23.0	10.2	20.5	61.4	3.9	38.3	53.8	22.9	48.1	34,193,236	46.6	108.1	42,319
46 Port Hueneme	85	11	83	1,904	2	13.7	4.8	22.3	0.0	4,403	1.2	14.1	6.1	21.5	< 0.1	< 0.1	8.2	7.8	-	0.8	616,819	0.8	94.9	0
Southern California Total	3,372	771	3,312	1,943	< 1	0.7	2.2	11.6	0.7	207,683	57.1	22.7	10.1	20.6	61.5	6.0	52.4	62.6	24.1	49.7	35,619,052	48.5	108.7	42,319
Northern California																								
10 San Francisco Bay Area	930	109	872	1,583	2	1.2	1.0	3.4	2.2	40,533	11.1	26.9	8.0	7.1	13.5	0.1	11.5	6.6	1.7	9.7	6,513,176	8.9	93.6	87,541
54 Stockton	56	17	56	1,541	43	0.7	8.7	23.3	4.7	2,870	0.8	8.3	6.7	11.7	-	-	-	1.3	2.5	0.7	574,982	0.8	126.9	0
18 Sacramento	28	14	27	1,492	151	5.8	13.6	28.0	2.8	1,776	0.5	22.4	6.4	18.8	< 0.1	0.6	-	2.1	1.3	0.4	385,161	0.5	89.1	0
14 Eureka	31	1	31	1,032	258	39.5	2.2	5.7	4.4	440	0.1	12.4	10.2	6.8	-	1.1	-	2.8	0.5	0.3	205,384	0.3	134.0	0
Northern California Total	1,045	141	986	1,561	16	2.1	2.1	6.0	2.5	45,619	12.5	25.4	7.9	7.9	13.5	1.8	11.5	12.8	6.0	11.1	7,678,703	10.5	96.0	87,541
Oregon																								
12 North Bend/Coos Bay	100	14	97	1,592	31	15.8	18.9	9.1	2.6	3,685	1.0	8.1	7.2	5.9	< 0.1	9.6	< 0.1	1.3	5.8	1.8	1,309,626	1.8	121.7	0
53 Newport	8	0	8	994	337	82.4	41.9	4.2	0.7	40	0.0	8.0	4.1	0.5	-	0.4	-	-	-	< 0.1	2,993	0.0	137.6	0
50 Astoria	54	0	54	649	401	88.0	0.0	5.6	1.8	78	0.0	0.0	0.0	2.1	-	0.6	-	-	-	< 0.1	11,588	0.0	114.4	0
8 Portland	466	92	461	1,743	8	5.0	6.7	3.4	1.2	20,443	5.6	14.4	7.2	4.5	2.8	3.0	18.7	3.1	19.1	8.4	6,143,969	8.4	103.5	8,472
4 Vancouver, WA	160	57	160	1,805	4	8.8	11.8	8.3	1.2	7,565	2.1	13.8	6.0	19.1	< 0.1	3.3	1.4	4.3	7.8	2.5	2,207,006	3.0	120.7	0
21 Longview, WA	205	34	200	1,904	11	12.7	7.4	5.9	2.4	9,145	2.5	9.1	8.6	7.1	-	27.0	-	5.3	15.2	4.8	4,245,446	5.8	89.4	22,898
Oregon Total	993	197	980	1,705	35	10.5	9.1	5.4	1.6	40,956	11.3	12.5	7.3	7.9	2.8	43.8	20.0	13.9	48.0	17.5	13,920,628	19.0	102.4	31,370
Washington																								
24 Aberdeen	86	0	82	1,480	92	19.0	17.4	7.9	1.1	2,907	0.8	4.5	7.5	1.9	-	16.9	-	0.8	-	0.3	181,116	0.2	91.8	153,232
27 Port Angeles	57	0	56	1,246	283	52.7	11.0	3.2	0.0	773	0.2	7.3	7.3	2.1	-	4.4	-	-	0.4	0.2	105,196	0.1	102.1	29,071
51 Port Gamble	13	0	13	725	495	88.4	23.4	0.0	0.0	17	0.0	0.0	0.0	0.0	-	-	-	< 0.1	-	< 0.1	0	0.0	-	0
47 Olympia	22	0	22	1,059	313	23.0	37.4	13.5	0.2	771	0.2	7.6	11.9	14.1	-	3.5	-	< 0.1	-	0.1	20,643	0.0	117.8	0
23 Tacoma	449	85	446	1,942	-	0.8	5.2	17.6	0.6	27,588	7.6	19.9	8.7	7.2	9.3	17.0	11.0	2.9	12.4	10.1	7,806,751	10.6	102.3	0
19 Seattle	591	163	582	1,825	< 1	2.7	4.9	13.0	0.4	34,490	9.5	26.4	8.0	14.5	12.8	0.5	5.1	4.2	6.6	10.1	7,425,880	10.1	101.5	54,740
32 Everett	67	0	65	1,421	142	22.0	11.2	7.8	0.7	1,471	0.4	5.9	7.5	2.1	< 0.1	5.6	-	0.2	0.6	0.3	154,717	0.2	80.9	6,556
25 Anacortes	13	0	13	1,314	178	48.8	30.4	2.7	0.0	278	0.1	10.3	20.3	0.1	-	0.5	-	-	0.4	0.1	93,797	0.1	88.3	0
7 Bellingham	32	4	32	1,564	67	12.4	17.6	11.9	0.0	1,418	0.4	8.1	9.2	10.9	< 0.1	-	-	2.5	1.6	0.5	410,501	0.6	99.7	0
Washington Total	1,330	252	1,311	1,763	39	6.2	6.8	14.2	0.5	69,712	19.2	21.6	8.3	10.6	22.1	48.4	16.1	10.7	21.9	21.7	16,198,601	22.1	101.4	243,599
Total/Average	6,740	1,361	6,589	1,815	15	3.3	4.0	10.6	1.0	363,970	100.0	21.7	9.2	15.6	100.0	100.0	100.0	100.0	100.0	100.0	73,416,984	100.0	104.4	404,829
% Change from Update of 6/96	+3.3	+14.3	+3.3	-0.3	0.0	-0.3	0.0	+2.7	+0.6	+8.2	+0.9	+0.7	+5.0		3.4%	7.6%	10.0%	16.5%	-10.5%	-0.0%			213.9%	

Clerks												
29 San Diego	4	0	4	***	***	23.0	38.8	10.4	9.5			
46 Port Hueneme	12	0	12	2,204	-	5.6	29.5	2.3	0.0			
63 Los Angeles/Long Beach	783	2	770	2,586	< 1	0.1	10.9	9.6	0.6			
14 Eureka	3	0	3	***	***	19.5	29.2	0.0	5.8			
30 SF Bay Area & Delta	268	5	261	2,261	3	3.2	5.7	1.3	2.2			
40 Portland	107	0	105	2,318	2	36.1	7.4	1.6	1.5			
23 Tacoma	58	0	56	2,652	-	0.2	43.0	4.7	1.2			
52 Seattle	163	0	163	2,625	< 1	16.3	16.4	6.0	0.9			
Total/Average	1,398	7	1,374	2,503	1	5.3	13.0	7.0	1.0			
Foremen/Walking Bosses												
29 San Diego	2	0	2	***	***	0.6	70.0	0.6	0.2			
46 Port Hueneme	6	-	6	1,905	56	1.4	15.2	0.0	0.0			
94 Los Angeles/Long Beach	320	-	316	3,077	-	0.1	8.1	0.0	1.3			
91 Northern Calif. Area	75	-	74	2,424	27	0.3	7.3	0.0	2.1			
92 Portland	55	-	54	2,532	14	11.7	12.9	0.0	4.4			
98 Seattle	101	-	100	2,626	4	10.2	15.3	0.0	0.4			
Total/Average	559		552	2,839	6	2.8	10.4	0.0	1.5			



* 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.