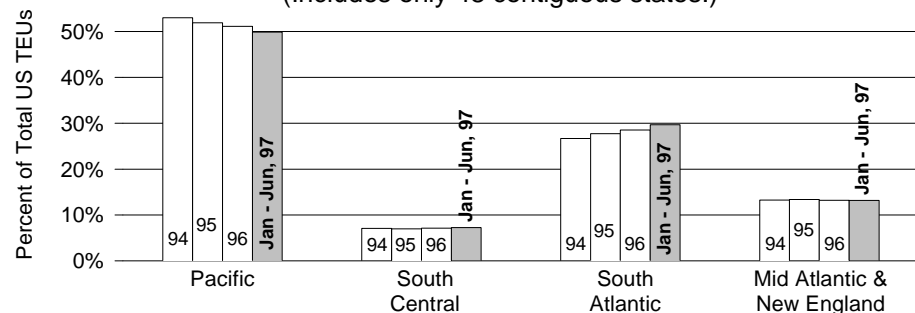


West Coast Container Counts as a Percent of U.S. Total Continue to Decline

Percent of Total U.S. Container TEUs by Major Port Region

By Calendar Year 1994, 1995, 1996 vs. Jan-Jun, 1997

(Includes only 48 contiguous states.)



Container TEUs handled on the U.S. West Coast in the first six months of 1997 accounted for slightly less than 50% of the total TEUs reported for the 48 contiguous states. This continues the downward trend in market share seen since 1994 when the West Coast handled 53% of U.S. containers.

PMA President Joe Miniace recently stated in an address to the Harbor Transportation Club at the Port of Los Angeles that "we have lost three percent of our market share in the last three years. This trend cannot continue.

Does this mean that shippers and vessel operators are already shifting cargo? It probably does!"

He continued, "The message to all [our] stakeholders, including the ILWU, is 'We have competition.'

"There are alternatives to using West Coast ocean ports. We must not give shippers a reason to even explore such alternatives. Once they decide to make a strategic change in their business, it will be very difficult, if not impossible, to recover what we have lost."

The South Atlantic ports have increased their share of the container trade from 26.7% in 1994 to 29.7% for the first six months of 1997. The other two major regions, the South Central and the Mid Atlantic & New England ports have shown no significant change in the period studied.

These percentages are based on data from the PIERS database furnished by the

Journal of Commerce.

The chart above shows the percentage reported for each of the major port regions by year for the three calendar years 1994, 1995, and 1996 as unshaded bars, and the percentage for the first six months of 1997 as a shaded bar.

The table to the right shows the percentage of container TEUs reported for various ports for the calendar year 1996 and for January through June of 1997.

Long Beach and Los Angeles continue to maintain their status as the largest container ports in the country, with 18.2% and 14.4% of total U.S. container volume, respectively. New York follows with 11.9%, and Charleston and Seattle place fourth and fifth with 6.6% and 6.5%.

Within the South Atlantic ports, Norfolk (Hampton Roads), Charleston, and Miami have each increased in percentage of containers handled over those reported in 1996. On the West Coast, only Long Beach has improved its market share. New York showed improvement as well.

NOTE: The data used in this analysis is from the PIERS database and was furnished by the *Journal of Commerce*. Only data applicable to the 48 contiguous states have been used. The port data have been summarized by PMA, who is responsible for errors or omissions. Unlike the PMA container data, the PIERS container data exclude Alaska and Hawaii containers, containers in the coastwise trade, and intercoastal containers.

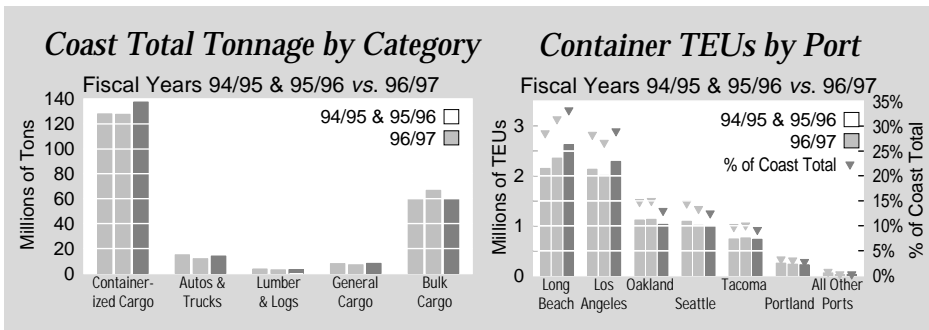
For more information on discretionary containers, see "Container Distribution within the United States," *PMA Update*, Vol. 8, No. 11, November 1996.

Container TEUs by Port as a Percent of US Total

	Percent of US Total	
	Jan-Dec 1996	Jan-Jun 1997
West		
<i>Pacific Coast</i>		
San Diego	0.1%	0.0%
Los Angeles	14.5	14.4
Long Beach	17.8	18.2
San Francisco	0.0	0.1
Oakland	6.1	5.5
Portland, OR	1.6	1.4
Vancouver, WA	<0.1	<0.1
Olympia, WA	0.0	<0.1
Seattle	7.2	6.5
Tacoma	3.9	3.7
Other West Coast	<0.1	0.1
Sutotal	51.1%	49.9%
<i>Mountain*</i>	0.0%	0.0%
Total for West	51.1%	49.9%
South		
<i>South Atlantic</i>		
Wilmington, DE	0.8%	0.7%
Baltimore	2.1	1.9
Norfolk (Hampton Roads)	3.6	5.4
Richmond, VA	0.3	0.3
Wilmington, NC	0.7	0.6
Charleston	6.1	6.6
Savannah	3.5	3.7
Jacksonville	1.4	1.4
Fernandina Beach, FL	0.1	0.1
Miami	3.9	4.3
Port Everglades	3.2	3.3
West Palm Beach	0.8	0.7
Other SA Containers	2.3	0.6
Sutotal	28.7%	29.7%
<i>East South Central</i>		
Mobile	0.1%	0.1%
Gulfpport	0.8	0.9
Other ESC Containers	<0.1	<0.1
Sutotal	1.0%	1.0%
<i>West South Central</i>		
New Orleans	1.6%	1.6%
Galveston	<0.1	<0.1
Houston	4.1	4.2
Other Gulf Containers	0.4	0.4%
Sutotal	6.2%	6.3%
Total for South	35.8%	36.9%
Midwest		
<i>North East Central</i>		
Great Lakes Ports	<0.1%	<0.1%
Sutotal	<0.1%	<0.1%
<i>West North Central*</i>	0.0%	0.0%
Total for Midwest	0.0%	0.0%
North East		
<i>New England</i>		
Boston	0.4%	0.4%
Sutotal	0.4%	0.4%
<i>Middle Atlantic</i>		
New York	11.7%	11.9%
Philadelphia	0.6	0.6
Other NE Containers	0.3	0.3
Sutotal	12.6%	12.8%
Total for North East	13.0%	13.2%
US Total TEUs	100.0%	100.0%

* This Region has no ocean ports.

Oakland, Portland, Seattle, and Tacoma Post Container Losses in 1996/97; Los Angeles & Long Beach Show Growth Over 1995/96



TEUs by Port which shows TEUs as vertical bars also shows, as inverted triangles, the percentage each annual value represents of coast total TEUs that year. The percentage figures are plotted relative to the axis on the right of the chart.

The table below presents the tonnage reported in each of the major ports for both of the last two July to June periods and the percentage change between the two years.

Long Beach continues to dominate the ports on the West Coast in containers handled (33.2% of the coast total) as well as total tonnage (26.4%). Los Angeles, the second largest port in volume, showed the greatest amount of growth in both containers (+14.4% over 1995/96) and in total cargo (+11.6%).

Coast in the period July 1996 through June 1997 rose about 1.6% above that reported in the previous twelve months. Containerized tonnage grew by 5.4%, and all other sectors except Bulk Cargo showed increases. General Cargo and Autos & Trucks showed double digit growth of 16.0% and 18.5%, respectively.

Each of the other major ports posted a decline in containers and in total tonnage, with Oakland suffering the largest decrease: -8.2% in total tonnage and -8.9% in container tonnage.

The charts above show the total tonnage by sector reported for each of the last three July to June periods and the number of TEUs reported in the six major ports in the same periods.

Total tonnage reported on the West

The chart above, labeled *Container*

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	157.4	2.14
JUL	149.9	154.3	157.5	2.07
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

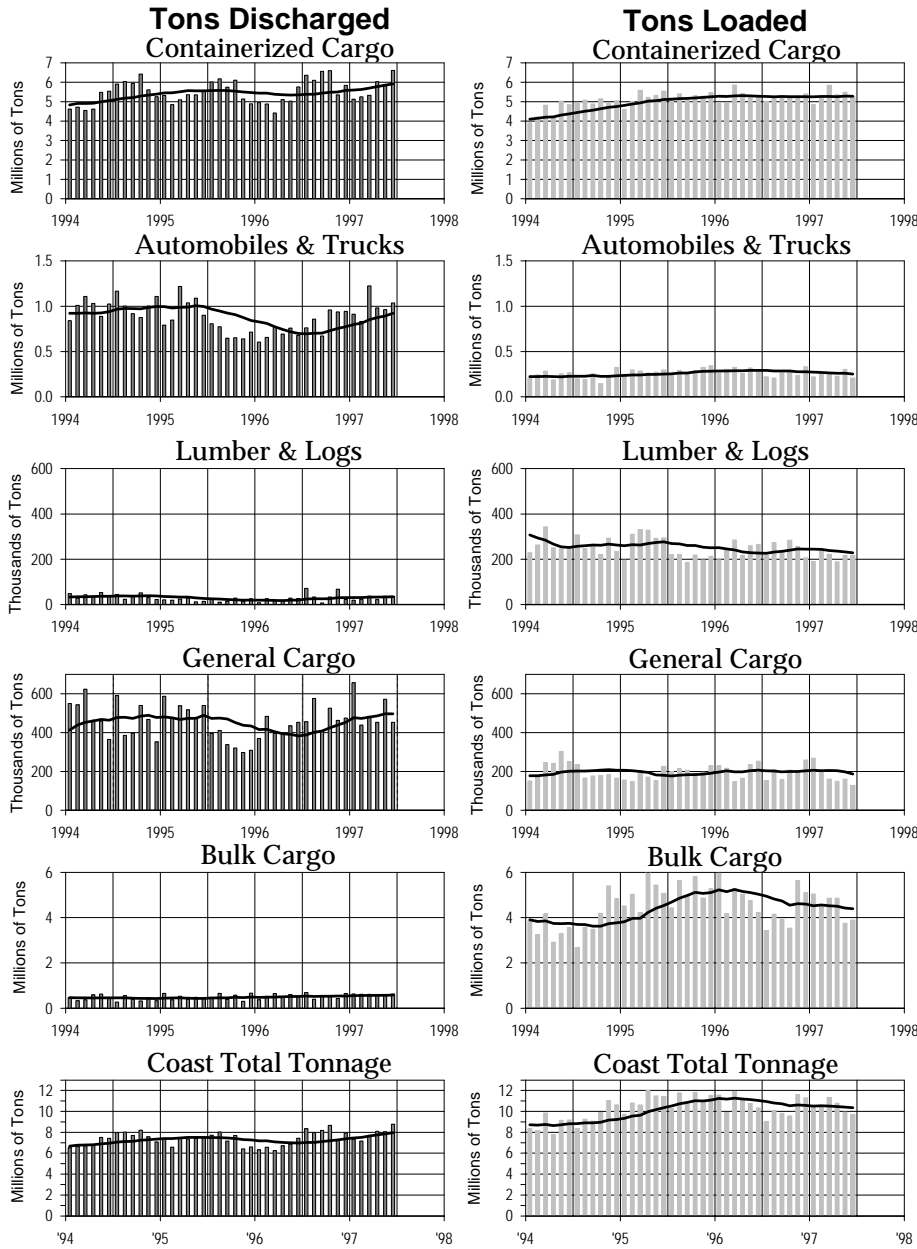
Tonnage by Reporting Category in the Six Largest West Coast Ports

July 1996-June 1997 vs. July 1995-June 1996

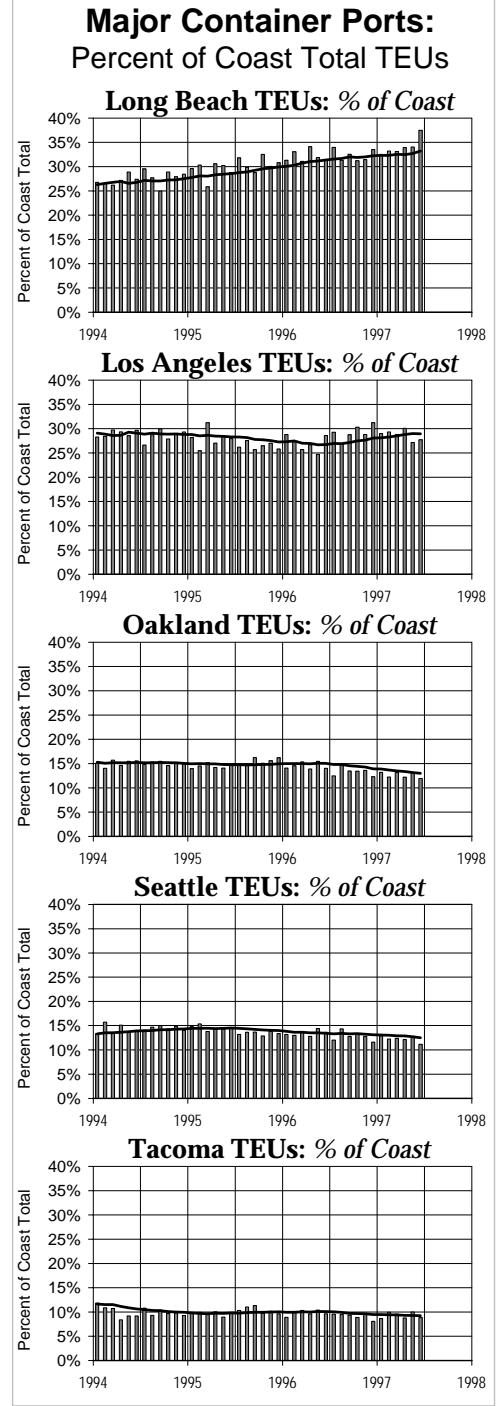
	July 1996-June 1997		July 1995-June 1996		Chg from 1995/96		July 1996-June 1997		July 1995-June 1996		Chg from 1995/96
	Total	% Coast	Total	% Coast			Total	% Coast			
Long Beach						Tacoma					
Containers	44,716,970	33.2%	40,147,013	31.4%	+ 11.4%	Containers	12,390,654	9.2%	12,889,774	10.1%	- 3.9%
Autos & Trucks	2,630,522	18.7	2,528,309	21.2	+ 4.0	Autos & Trucks	1,557,156	11.0%	1,200,791	10.1	+ 29.7
Logs & Lumber	97,807	3.1	87,189	2.9	+ 12.2	Logs & Lumber	537,720	17.0%	513,855	17.3	+ 4.6
General Cargo	1,683,331	20.5	1,496,246	21.1	+ 12.5	General Cargo	266,549	3.2%	192,094	2.7	+ 38.8
Bulk Cargo	8,789,931	14.7	9,149,141	13.7	- 3.9	Bulk Cargo	7,055,172	11.8%	6,878,618	10.3	+ 2.6
Total	57,918,561	26.4%	53,407,898	24.7%	+ 8.4%	Total	21,807,251	9.9%	21,675,132	10.0%	+ 0.6%
Los Angeles						Seattle					
Containers	38,979,368	29.0%	34,081,974	26.7%	+ 14.4%	Containers	16,806,846	12.5%	17,132,906	13.4%	- 1.9%
Autos & Trucks	2,483,802	17.6%	2,688,450	22.6	- 7.6	Autos & Trucks	764,037	5.4%	463,112	3.9	+ 65.0
Logs & Lumber	26,828	0.8%	27,589	0.9	- 2.8	Logs & Lumber	12,052	0.4%	15,645	0.5	- 23.0
General Cargo	2,806,600	34.1%	1,884,548	26.6	+ 48.9	General Cargo	294,089	3.6%	381,135	5.4	- 22.8
Bulk Cargo	4,529,146	7.6%	5,086,671	7.6	- 11.0	Bulk Cargo	4,119,928	6.9%	5,329,499	8.0	- 22.7
Total	48,825,744	22.2%	43,769,232	20.2%	+ 11.6%	Total	21,996,952	10.0%	23,322,297	10.8%	- 5.7%
Oakland						All Other Ports					
Containers	17,495,431	13.0%	19,214,607	15.0%	- 8.9%	Containers	446,760	0.3%	331,908	0.3%	+ 34.6%
Autos & Trucks	644,557	4.6%	549,459	4.6	+ 17.3	Autos & Trucks	3,255,916	23.1%	2,523,096	21.2	+ 29.0
Logs & Lumber	0	0.0%	0	0.0	-	Logs & Lumber	2,380,270	75.4%	2,239,198	75.4	+ 6.3
General Cargo	239,725	2.9%	255,807	3.6	- 6.3	General Cargo	2,664,413	32.4%	2,621,022	37.0	+ 1.7
Bulk Cargo	0	0.0%	0	0.0	-	Bulk Cargo	23,584,346	39.6%	27,482,933	41.3	- 14.2
Total	18,379,713	8.4%	20,019,873	9.3%	- 8.2%	Total	32,331,705	14.7%	35,198,157	16.3%	- 8.1%
Portland						Coast Total					
Containers	3,746,511	2.8%	3,941,518	3.1%	- 4.9%	Containers	134,582,540	100.0%	127,739,700	100.0%	+ 5.4%
Autos & Trucks	2,768,218	19.6%	1,953,545	16.4	+ 41.7	Autos & Trucks	14,104,208	100.0%	11,906,762	100.0	+ 18.5
Logs & Lumber	102,833	3.3%	88,204	3.0	+ 16.6	Logs & Lumber	3,157,510	100.0%	2,971,680	100.0	+ 6.3
General Cargo	268,952	3.3%	259,560	3.7	+ 3.6	General Cargo	8,223,659	100.0%	7,090,412	100.0	+ 16.0
Bulk Cargo	11,529,237	19.3%	12,685,053	19.0	- 9.1	Bulk Cargo	59,607,760	100.0%	66,611,915	100.0	- 10.5
Total	18,415,751	8.4%	18,927,880	8.7%	- 2.7%	Total	219,675,677	100.0%	216,320,469	100.0%	+ 1.6%

Monthly Tonnage by Reporting Category: Discharged vs. Loaded

Actual Tons Reported by Month



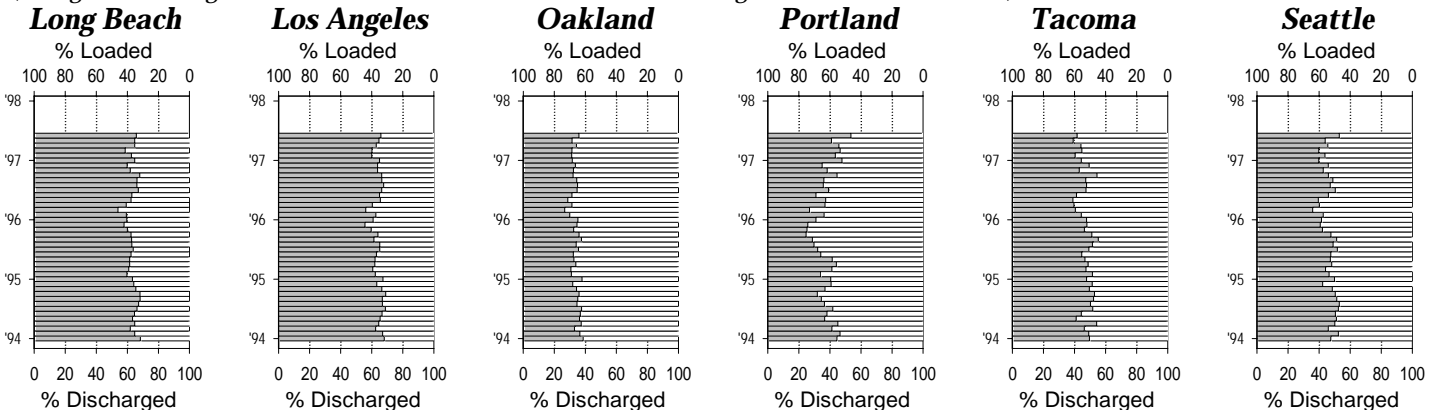
In the Tonnage graphs above, bars represent monthly totals, and the lines show 12-month moving averages.



"Weighted" Tonnage: % Discharged vs. % Loaded

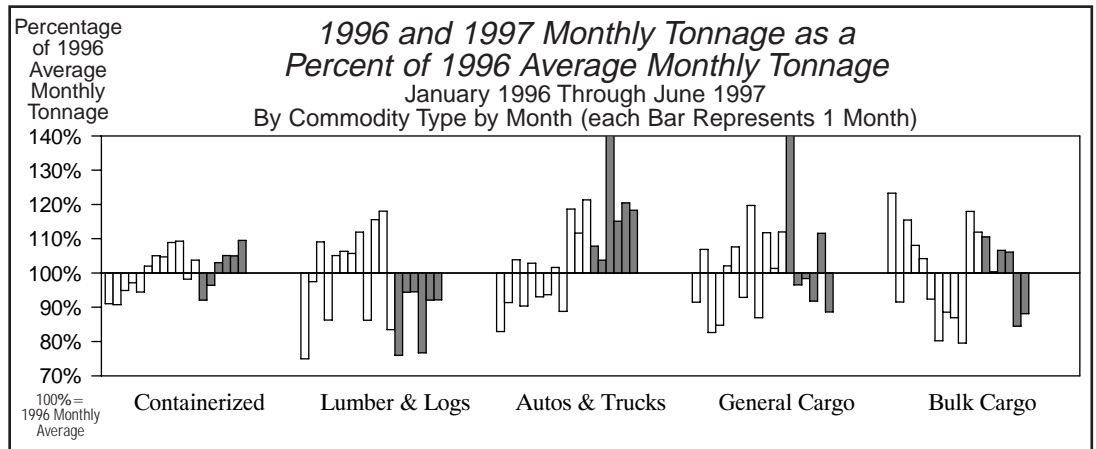
("Weighted" Tonnage = Containerized + Autos & Trucks + Lumber & Logs + General + 1/50 of Bulk)

% 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 8/6/97)		(Ending 8/2/97)		Hours Paid:					Hours Paid at					% of Category Coast Total (12 Months-to-Date)						% of 1997 YTD				
	TOTAL	Class "B"	Number Working	Annual Hrs Pd	Wkly PGP	Out of Port	Other Local	Cas-uals	Inac-tives	P/R Wks 1-32, '97	% Cst	Occ Codes	Exp. Rates*	Cont'r RU's	Lmbr Logs	Autos Trucks	Other Gen'l	Bulk Cargo	TOTAL	1997 YTD (Jan-Jun)	% of Coast Total	'97 as a % of '96	Cstwise Loaded		
NO.	NO.	NO.	HRS	\$	%	%	%	%	HRS	%	%	%	%	%	%	%	%	%	TONS	TONS	%	%	TONS		
Longshorem																									
<i>Southern California</i>																									
29 San Diego	56	16	54	1,578	7	6.2	6.9	31.2	1.0	2,635	0.7	10.9	12.2	27.9	0.1	1.9	7.3	1.1	1.3	0.9	1,229,790	1.1	182.3	0	
13 Los Angeles/Long Beach	3,191	744	3,140	2,011	< 1	0.4	2.7	11.4	0.6	204,696	55.9	23.2	10.1	21.0	62.2	3.9	36.3	54.6	22.3	48.6	52,538,508	47.8	108.6	83,204	
46 Port Hueneme	85	11	82	1,938	2	18.8	4.3	23.4	0.0	4,486	1.2	14.1	6.1	22.4	< 0.1	< 0.1	8.3	7.7	-	0.8	979,915	0.9	101.4	0	
Southern California Total	3,332	771	3,276	2,002	< 1	0.9	2.8	12.0	0.6	211,817	57.8	22.8	10.1	21.1	62.3	5.9	51.9	63.4	23.6	50.3	54,748,213	49.8	109.5	83,204	
<i>Northern California</i>																									
10 San Francisco Bay Area	950	135	887	1,588	1	0.9	0.8	2.9	1.8	41,075	11.2	26.8	8.0	8.0	13.2	0.1	10.3	6.8	1.8	9.5	9,977,624	9.1	93.8	153,997	
54 Stockton	56	17	56	1,553	51	0.2	8.0	21.6	2.7	2,910	0.8	8.1	7.0	11.6	-	-	-	1.3	2.4	0.7	826,216	0.8	103.6	0	
18 Sacramento	26	11	26	1,556	164	2.5	13.2	25.8	2.5	1,489	0.4	22.9	6.7	16.4	< 0.1	0.5	-	2.1	1.3	0.4	498,459	0.5	93.0	0	
14 Eureka	31	1	31	985	288	18.6	3.7	5.2	3.1	437	0.1	12.6	10.6	6.3	-	1.2	-	2.7	0.5	0.3	350,804	0.3	115.2	0	
Northern California Total	1,063	164	1,000	1,567	17	1.2	1.8	5.3	1.9	45,911	12.5	25.3	7.9	8.5	13.2	1.8	10.3	12.9	6.1	10.9	11,653,103	10.6	94.9	153,997	
<i>Oregon</i>																									
12 North Bend/Coos Bay	99	14	96	1,591	39	7.1	19.1	8.6	1.6	3,452	0.9	8.0	7.0	5.6	< 0.1	9.7	< 0.1	0.9	5.7	1.7	1,911,221	1.7	104.1	2,467	
53 Newport	8	0	8	968	354	76.4	38.4	5.4	0.8	33	0.0	7.0	3.6	1.2	-	0.2	-	-	-	< 0.1	2,993	0.0	41.8	0	
50 Astoria	54	0	54	650	406	83.3	0.0	5.7	0.2	80	0.0	0.0	0.0	2.0	-	0.6	-	-	-	< 0.1	18,605	0.0	120.3	0	
8 Portland	460	81	454	1,760	11	2.7	6.6	3.3	1.4	20,111	5.5	14.5	7.2	4.3	2.8	3.3	19.6	3.3	19.3	8.4	8,703,452	7.9	103.8	15,483	
4 Vancouver, WA	160	54	159	1,820	5	8.5	11.2	8.2	0.8	7,226	2.0	13.9	6.2	18.2	< 0.1	3.2	1.8	4.3	8.2	2.5	3,070,381	2.8	121.0	0	
21 Longview, WA	200	33	196	1,916	12	10.3	7.4	6.0	3.0	8,945	2.4	9.2	8.6	6.9	-	26.9	-	5.3	15.4	4.8	5,908,244	5.4	90.8	31,601	
Oregon Total	981	182	967	1,716	38	7.4	8.9	5.3	1.7	39,847	10.9	12.6	7.3	7.5	2.8	43.8	21.4	13.8	48.6	17.4	19,614,896	17.9	101.7	49,551	
<i>Washington</i>																									
24 Aberdeen	77	0	76	1,577	90	22.6	18.7	8.1	1.7	2,981	0.8	4.8	7.5	2.1	-	17.6	-	0.7	-	0.3	302,038	0.3	93.5	166,519	
27 Port Angeles	56	0	56	1,209	314	44.0	11.7	3.1	0.0	660	0.2	7.1	6.9	1.9	-	4.3	-	< 0.1	0.3	0.1	156,184	0.1	68.6	38,985	
51 Port Gamble	13	0	13	649	547	91.5	3.1	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	1,180	276	11.8	31.0	23.4	0.0	940	0.3	10.4	12.8	21.1	< 0.1	3.4	< 0.1	< 0.1	-	0.1	52,692	0.0	159.4	0	
23 Tacoma	451	93	448	1,904	-	0.8	5.8	16.9	0.3	27,055	7.4	20.3	8.7	6.9	9.2	17.0	11.0	3.2	11.8	9.9	11,320,570	10.3	98.3	0	
19 Seattle	587	143	581	1,828	< 1	4.2	5.9	13.2	0.3	33,966	9.3	26.8	7.9	14.3	12.5	0.4	5.4	3.6	6.9	10.0	11,032,005	10.0	100.3	85,629	
32 Everett	63	0	60	1,370	152	18.1	13.3	7.6	0.4	1,496	0.4	5.7	8.1	2.2	< 0.1	5.5	-	0.2	0.6	0.3	227,631	0.2	83.3	8,291	
25 Anacortes	13	0	13	1,415	145	24.6	26.8	2.1	0.0	301	0.1	10.7	20.7	0.2	-	0.4	-	-	0.5	0.1	174,676	0.2	118.4	0	
7 Bellingham	37	8	37	1,316	90	13.6	15.3	11.4	0.0	1,257	0.3	8.6	9.5	10.4	< 0.1	-	-	2.3	1.5	0.5	584,176	0.5	91.1	0	
Washington Total	1,319	244	1,306	1,751	40	6.5	7.5	14.1	0.4	68,673	18.8	22.0	8.4	10.4	21.7	48.5	16.5	9.9	21.7	21.3	23,849,972	21.7	98.7	299,424	
Total/Average	6,695	1,361	6,549	1,843	16	2.9	4.4	10.7	0.8	366,248	100.0	21.9	9.2	16.0	100.0	100.0	100.0	100.0	100.0	100.0	109,866,184	100.0	103.9	586,176	
% Change from Update of 8/96	+2.6	+14.3	+2.6	+1.2	+6.7	-0.7	+0.4	+2.8	+0.4	+8.9	-0.7	+0.7	+5.4	5.4%	6.3%	18.5%	16.0%	-10.5%	1.6%				143.2%		

Clerks																							
29 San Diego	4	0	4	***	***	51.0	39.4	10.4	6.7														
46 Port Hueneme	12	0	12	2,144	-	4.7	29.8	3.2	0.0														
63 Los Angeles/Long Beach	834	4	821	2,530	< 1	0.1	10.2	10.7	0.7														
14 Eureka	3	0	3	***	***	8.9	31.4	0.0	4.4														
30 SF Bay Area & Delta	264	6	258	2,215	4	1.7	6.5	1.3	2.6														
40 Portland	104	0	102	2,320	2	37.7	7.4	1.7	3.4														
23 Tacoma	62	0	61	2,628	-	0.0	39.8	4.7	0.7														
52 Seattle	174	0	173	2,565	2	15.2	17.6	5.5	0.5														
Total/Average	1,457	10	1,434	2,459	2	4.8	12.6	7.7	1.2														
Foremen/Walking Bosses																							
29 San Diego	2	0	2	***	***	0.0	70.0	0.7	1.2														
46 Port Hueneme	6	-	6	1,889	52	0.0	15.3	0.0	0.0														
94 Los Angeles/Long Beach	318	-	315	3,161	< 1	0.0	7.9	0.0	0.6														
91 Northern Calif. Area	74	-	73	2,429	25	0.0	7.3	0.0	2.0														
92 Portland	54	-	53	2,512	14	9.2	13.4	0.0	4.3														
98 Seattle	98	-	98	2,596	4	12.6	15.5	0.0	1.8														
Total/Average	552		547	2,882	6	3.0	10.3	0.0	1.3														



* 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.