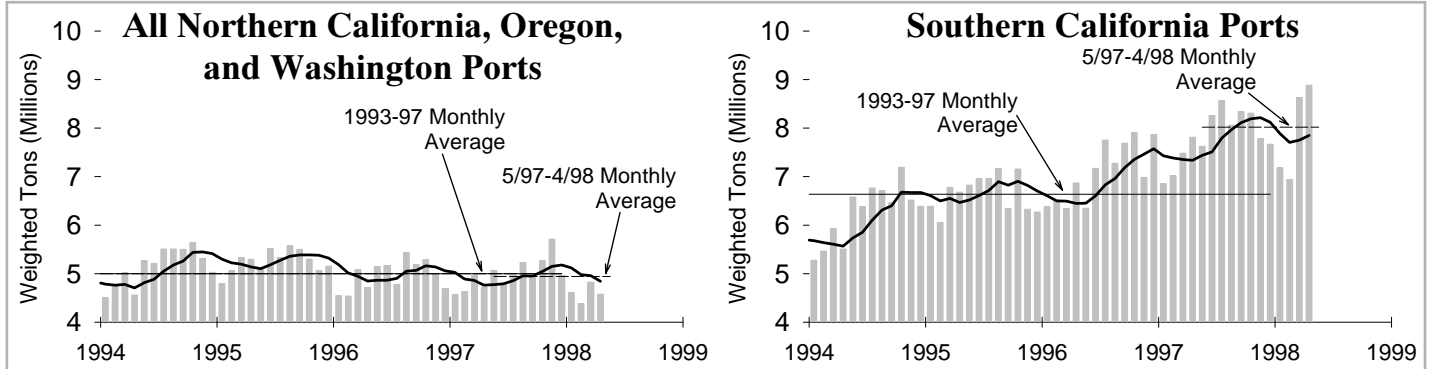


Since 1994, So. Calif. Surges, and Rest of Coast Stagnates



Total annual weighted tonnage¹ handled through U.S. West Coast ports has grown about 28% in the five years 1993 through 1997. However, this growth from 120.1 million weighted tons to 153.6 million tons has not been enjoyed equally among all port areas on the Coast.

The above charts show the extreme discrepancy between the cargo volume handled in the Southern California port areas versus all of the other ports on the Coast. The chart on the left illustrates the decline in cargo volume handled north of Port Hueneme, from a peak period in late 1994 through 1995 to the steady state seen since the beginning of 1996. In sharp contrast is the continual growth pattern exhibited by the Southern California ports in the chart on the right.

In each chart, the vertical bars show the amount of weighted tonnage reported for each month, and the dark, solid line following the profile of the tops of the bars represents six-month running averages. The solid straight line represents the monthly average for the five-year period 1993-1997², and the dashed straight line represents the monthly average during the most recent twelve-month period for which data are available (May 1997-April 1998).

The growth in weighted tonnage in the port area of Los Angeles/Long Beach has been sufficient to drive the tonnage growth

¹In this study, "weighted" tonnage is calculated as the sum of 17 times TEUs, Lumber & Logs tonnage, General Cargo tonnage, 1/6 of Automobiles & Trucks tonnage, and 1/50 of Bulk Cargo tonnage. Loaded coastwise cargo is also included in these data.

²Annual tonnage data for each port in 1993 was used in this study, but because of reporting anomalies affecting monthly data in 1993 for some ports, the 1993 data are not shown by month.

seen for the Coast as a whole. In fact, the average for the most recent 12 months in LA/LB is 20.7% higher than the average for the 1993-97 period. The May 1997-April 1998 average for all of the other ports on the Coast declined to a level 0.5% below the 1993-97 average.

Individual Port Area Data

The charts on the next page show monthly weighted tonnage in each non-major port area since 1994², and the table shows market share of weighted tonnage by port area. The port areas are shown in order of increasing amounts of market share—the figure used is the average annual percentage of total coast weighted tonnage that is attributable to each port area for the five years 1993-1997.

The charts, which are analogous to the charts above, show at a glance that most of the port areas have experienced downturns

in tonnage, or at best, short periods of growth followed by periods of tonnage loss. Only four port areas outside of Southern California have shown growth as measured by the recent twelve months compared to 1993-1997: Tacoma, Olympia, Vancouver, WA, and Stockton.

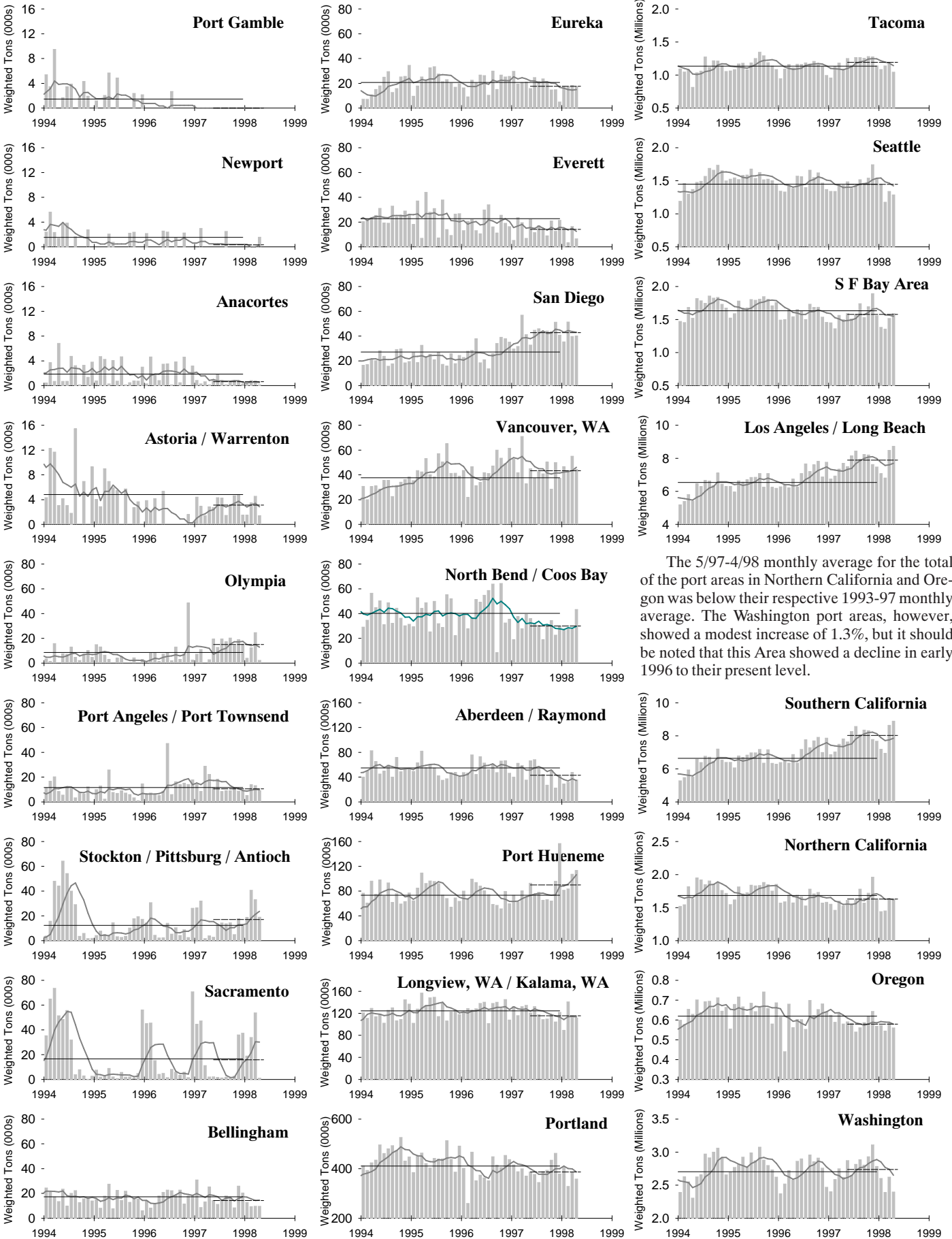
1998/99 Assessment Rates on man-hours and tonnage are found on the PMA website at <http://www.pmanet.org>. All rates are effective July 11, 1998.

CONSUMER PRICE INDEX U.S. CITY AVERAGE - ALL ITEMS (1982-84 = 100)				
Urban Wage Earners & Clerical Workers				
Month	1996	1997	1998	12 Mo.
JAN	151.7	156.3	158.4	1.34%
FEB	152.2	156.8	158.5	1.08
MAR	152.9	157.0	158.7	1.08
APR	153.6	157.2	159.1	1.21
MAY	154.0	157.2	159.5	1.46
JUN	154.1	157.4		2.14
JUL	154.3	157.5		2.07
AUG	154.5	157.8		2.14
SEP	155.1	158.3		2.06
OCT	155.5	158.5		1.93
NOV	155.9	158.5		1.67
DEC	155.9	158.2		3.31

	Change from 1993-97 Average Monthly Weighted Tonnage to 5/97-4/98 Average	Market Share 5/97-4/98	
		Average Market Share 1993/97	
Port Gamble	-100.0%	0.01%	0.00%
Newport	-78.0	0.01	0.00
Anacortes	-64.6	0.02	0.01
Astoria / Warrenton	-35.3	0.04	0.02
Olympia	74.8	0.07	0.12
Port Angeles/ Port Townsend	-9.6	0.10	0.08
Stockton/Pittsburg /Antioch	38.0	0.10	0.13
Sacramento	-4.4	0.14	0.12
Bellingham	-17.4	0.15	0.11
Eureka	-15.3	0.18	0.14
Everett	-37.7	0.20	0.11
San Diego	57.9	0.23	0.33
Vancouver, WA	15.0	0.32	0.33
North Bend/ Coos Bay	-25.3	0.35	0.23
Aberdeen/ Raymond	-21.4	0.48	0.33
Port Hueneme	22.7	0.63	0.69
Longview, WA/ Kalama, WA	-7.2	1.08	0.89
Portland	-5.8	3.54	2.98
Tacoma	5.2	9.79	9.20
Seattle	-0.2	12.47	11.16
San Francisco Bay Area	-3.3	14.11	12.18
Los Angeles/ Long Beach	20.7	55.96	60.84
COAST	11.4	100.00	100.00

Weighted Tonnage by Month: Non-Major Ports

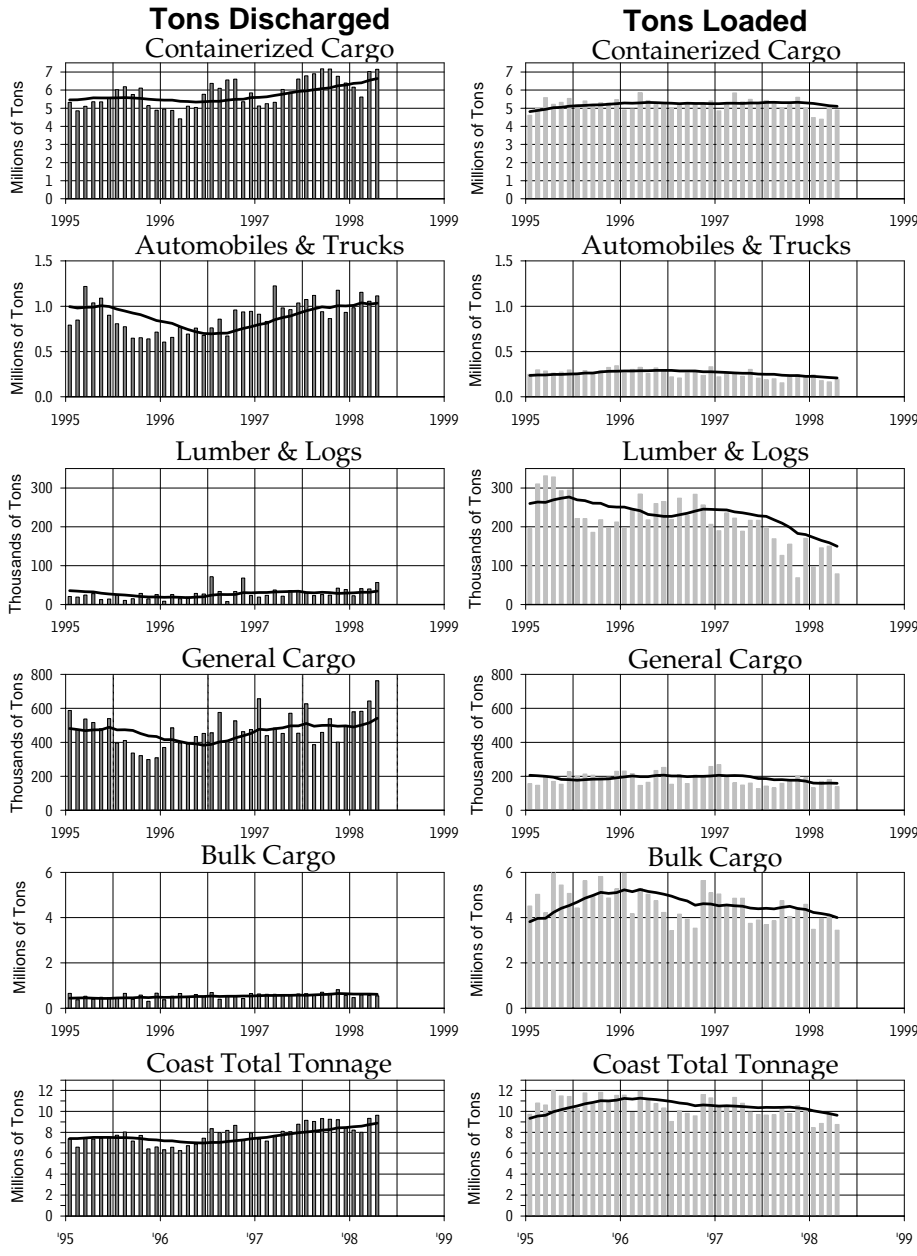
$$\text{Weighted Tonnage} = (17 \times \text{TEUs}) + \text{Lumber \& Logs} + (\text{Autos \& Trucks} / 6) + \text{General Cargo} + (\text{Bulk Cargo} / 50)$$



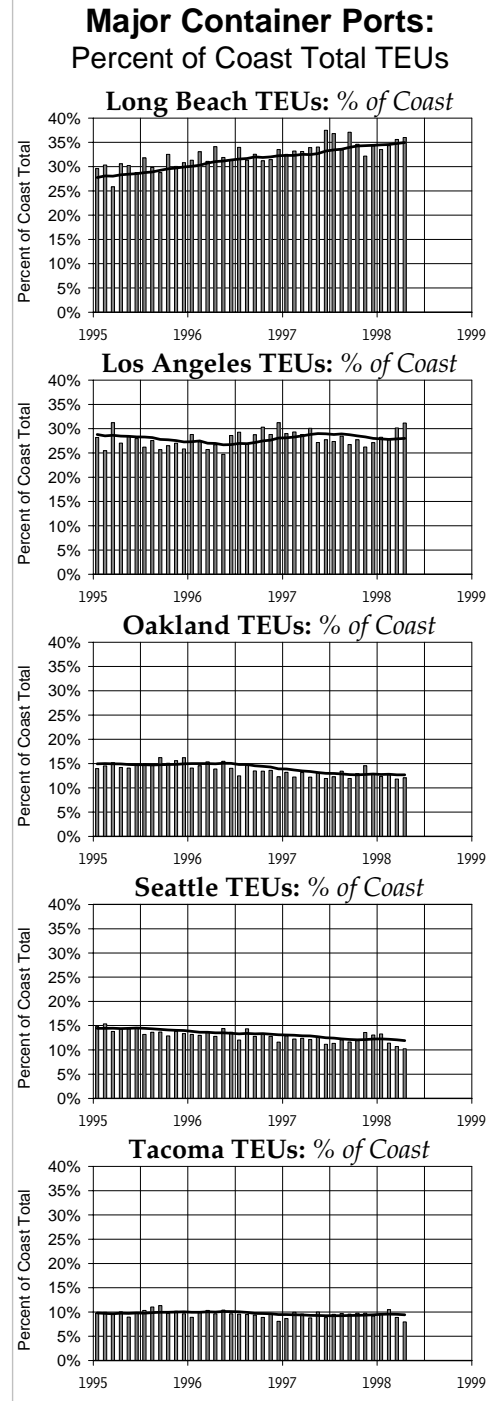
The 5/97-4/98 monthly average for the total of the port areas in Northern California and Oregon was below their respective 1993-97 monthly average. The Washington port areas, however, showed a modest increase of 1.3%, but it should be noted that this Area showed a decline in early 1996 to their present level.

Monthly Tonnage by Reporting Category: Discharged vs. Loaded

Actual Tons Reported by Month



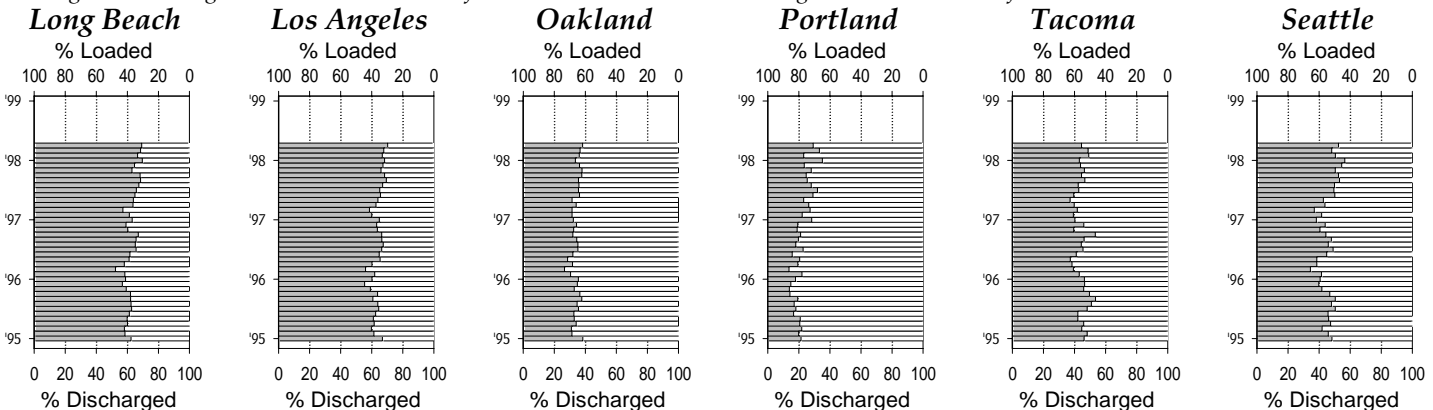
In the Tonnage graphs above, bars represent monthly totals, and the lines show 12-month moving averages.



"Weighted" Tonnage: % Discharged vs. % Loaded

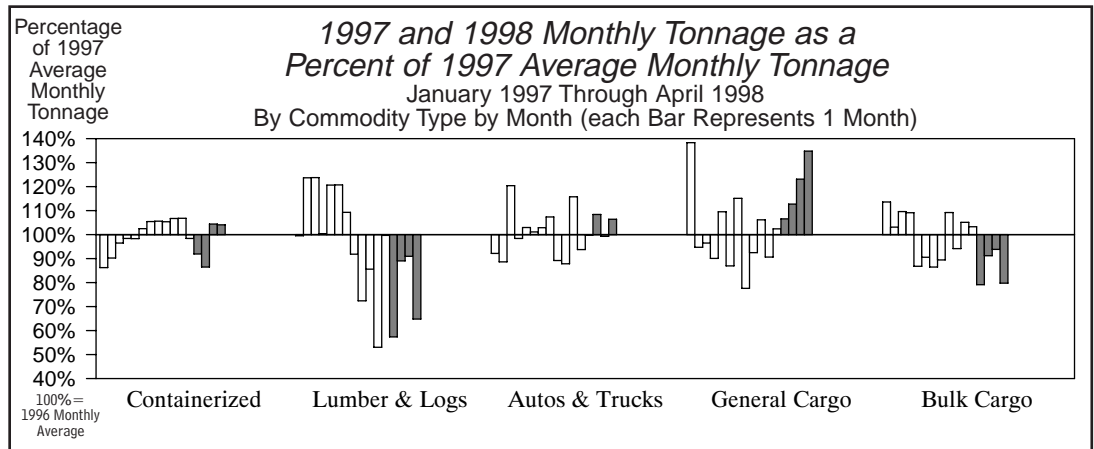
("Weighted" Tonnage = Containerized + 1/6 of Autos & Trucks + Lumber & Logs + General + 1/50 of Bulk)

% 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 6/12/98)		(Ending 5/30/98)		Hours Paid:					Hours Paid at					% of Category Coast Total (12 Months-to-Date)					% of 1998 YTD					
	TOTAL	Class "B"	Number Working	Annual Hrs Pd	Wkly PGP	Out of Port	Other Local	Cas-uals	Inac-tives	P/R Wks 1-23, '98	Avg. Wkly HRS	% Cst	Occ Codes Clk	Frm	Exp. Rates*	Cont'r RU's	Lmbr Logs	Autos Trucks	Other Gen'l	Bulk Cargo	TOTAL	1998 YTD (Jan-Apr)	% of Coast Total	'98 as a % of '97	Cstwise Loaded
NO.	NO.	NO.	HRS	\$	%	%	%	%	HRS	%	%	%	%	%	%	%	%	%	%	%	TONS	%	%	TONS	
Longshoremen																									
<i>Southern California</i>																									
29 San Diego	54	20	53	1,960	6	11.7	3.6	30.3	1.6	2,738	0.7	9.3	12.0	34.1	0.1	3.0	10.9	0.7	1.5	1.2	923,750	1.3	114.2	0	
13 Los Angeles/Long Beach	3,522	899	3,481	2,125	< 1	0.2	1.9	10.2	0.6	237,428	60.2	23.4	9.9	25.1	63.0	7.4	34.0	54.0	23.3	50.3	36,370,498	51.3	106.4	49,674	
46 Port Hueneme	83	12	79	2,110	3	9.4	5.6	37.4	0.6	6,866	1.7	14.4	6.5	36.5	0.1	<0.1	10.2	8.2	-	1.1	878,699	1.2	142.5	0	
Southern California Total	3,659	931	3,613	2,122	< 1	0.5	2.0	11.2	0.6	247,031	62.6	23.0	9.8	25.6	63.2	10.3	55.1	62.9	24.8	52.5	38,172,947	53.8	107.2	49,674	
<i>Northern California</i>																									
10 San Francisco Bay Area	997	206	940	1,621	< 1	2.3	2.3	3.5	1.3	45,867	11.6	26.4	7.9	15.5	12.9	<0.1	7.9	6.7	1.8	9.4	6,462,954	9.1	99.2	87,224	
54 Stockton	55	19	54	1,600	48	4.1	8.4	18.3	0.9	2,538	0.6	12.7	7.3	9.2	<0.1	-	-	2.1	2.4	0.7	355,978	0.5	61.9	0	
18 Sacramento	25	7	25	1,528	147	10.7	18.7	18.6	0.0	1,797	0.5	22.7	6.3	14.0	-	0.3	-	2.0	1.2	0.4	322,245	0.5	83.7	0	
14 Eureka	31	0	31	860	375	42.7	4.1	5.1	0.0	375	0.1	13.2	10.7	6.1	-	0.9	-	2.1	0.7	0.3	186,586	0.3	90.8	6,898	
Northern California Total	1,108	232	1,050	1,595	18	3.2	3.2	5.0	1.2	50,577	12.8	25.5	7.8	15.0	12.9	1.2	7.9	13.0	6.0	10.7	7,327,763	10.3	95.4	94,122	
<i>Oregon</i>																									
12 North Bend/Coos Bay	100	20	98	1,418	105	30.3	6.1	3.3	1.2	2,085	0.5	10.6	8.0	1.2	<0.1	8.3	-	1.0	5.9	1.6	1,058,068	1.5	80.8	10,140	
53 Newport	8	0	8	552	470	76.7	38.0	2.0	3.3	24	0.0	0.0	0.0	0.0	-	0.2	-	-	-	<0.1	1,573	0.0	52.6	0	
50 Astoria	50	0	50	508	494	79.8	0.0	2.1	2.5	125	0.0	0.5	0.5	2.6	-	1.5	-	<0.1	-	<0.1	10,934	0.0	94.4	0	
8 Portland	466	67	459	1,740	15	2.9	8.9	2.8	1.0	20,183	5.1	14.7	7.3	3.2	2.5	4.4	17.4	3.4	20.6	8.1	5,822,969	8.2	94.8	10,864	
4 Vancouver, WA	153	46	152	1,739	9	12.6	10.5	4.8	2.1	6,619	1.7	15.0	6.6	13.8	<0.1	1.3	3.3	3.8	8.0	2.4	1,689,148	2.4	76.5	0	
21 Longview, WA	200	31	198	1,820	18	13.9	3.9	4.0	1.0	7,873	2.0	9.1	8.1	5.2	-	28.5	-	6.2	15.5	4.4	3,178,909	4.5	74.9	26,513	
Oregon Total	977	164	965	1,650	53	10.8	7.9	3.4	1.2	36,908	9.4	13.3	7.3	5.4	2.5	44.1	20.7	14.4	50.0	16.4	11,761,601	16.6	84.5	47,517	
<i>Washington</i>																									
24 Aberdeen	71	0	71	1,464	149	23.1	11.3	5.1	0.9	1,802	0.5	6.7	7.2	0.5	<0.1	16.9	-	0.8	-	0.2	109,811	0.2	60.6	100,472	
27 Port Angeles	56	0	56	852	469	69.6	5.2	1.2	0.0	311	0.1	8.4	7.1	0.0	-	2.4	-	-	0.3	0.1	62,143	0.1	59.1	28,465	
51 Port Gamble	13	0	12	435	678	83.9	7.4	0.0	0.0	18	0.0	0.0	2.7	0.0	-	-	-	-	-	-	0	0.0	-	0	
47 Olympia	30	8	30	1,228	103	4.3	18.8	28.1	0.1	947	0.2	16.1	16.5	22.8	0.1	2.1	<0.1	0.1	-	0.1	43,046	0.1	208.5	0	
23 Tacoma	481	91	468	1,773	< 1	1.1	6.3	10.8	0.4	23,722	6.0	22.6	9.2	3.9	9.4	17.0	11.4	3.5	10.3	9.6	6,573,765	9.3	84.2	0	
19 Seattle	578	138	565	1,824	< 1	2.1	6.4	9.0	0.7	30,927	7.8	26.4	7.8	8.4	11.9	0.5	4.9	3.3	6.0	9.5	6,365,003	9.0	85.7	41,098	
32 Everett	57	0	53	1,341	158	12.7	15.2	5.3	0.3	1,386	0.4	5.2	7.8	3.5	<0.1	5.5	-	0.3	0.6	0.2	139,404	0.2	90.1	2,268	
25 Anacortes	13	0	13	1,168	208	32.1	4.9	0.1	0.0	253	0.1	10.6	22.7	0.2	-	<0.1	-	-	0.6	0.2	98,964	0.1	105.5	0	
7 Bellingham	37	5	37	1,157	182	27.0	10.5	5.4	0.1	704	0.2	11.0	10.6	4.6	-	-	-	1.8	1.5	0.4	249,167	0.4	60.7	0	
Washington Total	1,336	242	1,305	1,673	51	5.5	7.1	9.6	0.5	60,071	15.2	23.3	8.6	6.4	21.4	44.3	16.2	9.7	19.3	20.3	13,641,303	19.2	84.2	172,303	
Total/Average	7,080	1,569	6,933	1,892	20	2.9	3.7	9.3	0.7	394,588	100.0	22.5	9.2	19.3	100.0	100.0	100.0	100.0	100.0	100.0	70,903,614	100.0	96.6	363,616	
% Change from Update of 6/97	+5.0	+15.3	+5.2	+4.2	+33.3	-0.4	-0.3	-1.3	-0.3	+8.4	+0.8	0.0	+3.7		6.2%	-31.4%	9.4%	1.6%	-9.0%	1.4%				-10.2%	

Clerks																								
29 San Diego	5	0	5	2,167	-	19.8	32.5	9.4	0.0															
46 Port Hueneme	12	0	12	2,237	-	2.7	34.3	9.6	0.0															
63 Los Angeles/Long Beach	914	2	899	2,545	< 1	0.1	10.3	11.9	0.6															
14 Eureka	3	0	3	***	***	20.0	38.2	0.0	0.0															
34 SF Bay Area & Delta	272	9	265	2,300	3	3.0	7.2	1.8	1.4															
40 Portland	98	0	96	2,391	1	33.2	8.3	1.4	1.1															
23 Tacoma	65	0	65	2,607	-	0.1	39.3	2.5	1.0															
52 Seattle	182	0	180	2,535	< 1	14.3	13.3	2.8	0.8															
Total/Average	1,551	11	1,525	2,487	1	4.4	12.2	8.3	0.8															
Foremen/Walking Bosses																								
29 San Diego	2	0	2	***	***	0.2	69.3	1.1	3.0															
46 Port Hueneme	5	-	5	2,246	15	0.2	39.3	0.5	0.0															
94 Los Angeles/Long Beach	336	-	332	3,473	< 1	0.2	5.1	0.0	0.7															
91 Northern Calif. Area	74	-	73	2,493	24	0.5	11.1	0.0	1.7															
92 Portland	50	-	49	2,480	16	10.4	12.7	0.0	3.7															
98 Seattle	97	-	97	2,623	5	10.0	12.8	0.0	0.8															
Total/Average	564	558	3,095	6	2.4	8.5	0.0	1.1																



* 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.