

The Northwest Seaport Alliance

WPPA Spring Meeting
May 15, 2025

John Wolfe
Chief Executive Officer

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Director, Business Development



Our Structure



Our Mission

WHY ARE WE HERE?

To create sustainable economic opportunities for our region by increasing cargo volumes and supporting a healthy supply chain ecosystem.

WHERE ARE WE GOING?

To be the gateway of choice through best-in-class customer experience, environmental leadership, and competitive services.

WHAT DO WE STAND FOR?

- Service Excellence and Partnership
- Boldness, Innovation and Adaptability
- Environmental Leadership
- Fiscal Responsibility & Asset Management
- Health & Safety



NWSA IMPACT



JOB CREATION

- 3.8 Million ILWU Hours
- 58,400 Family Wage Jobs
- 2.9 Job Multiplier

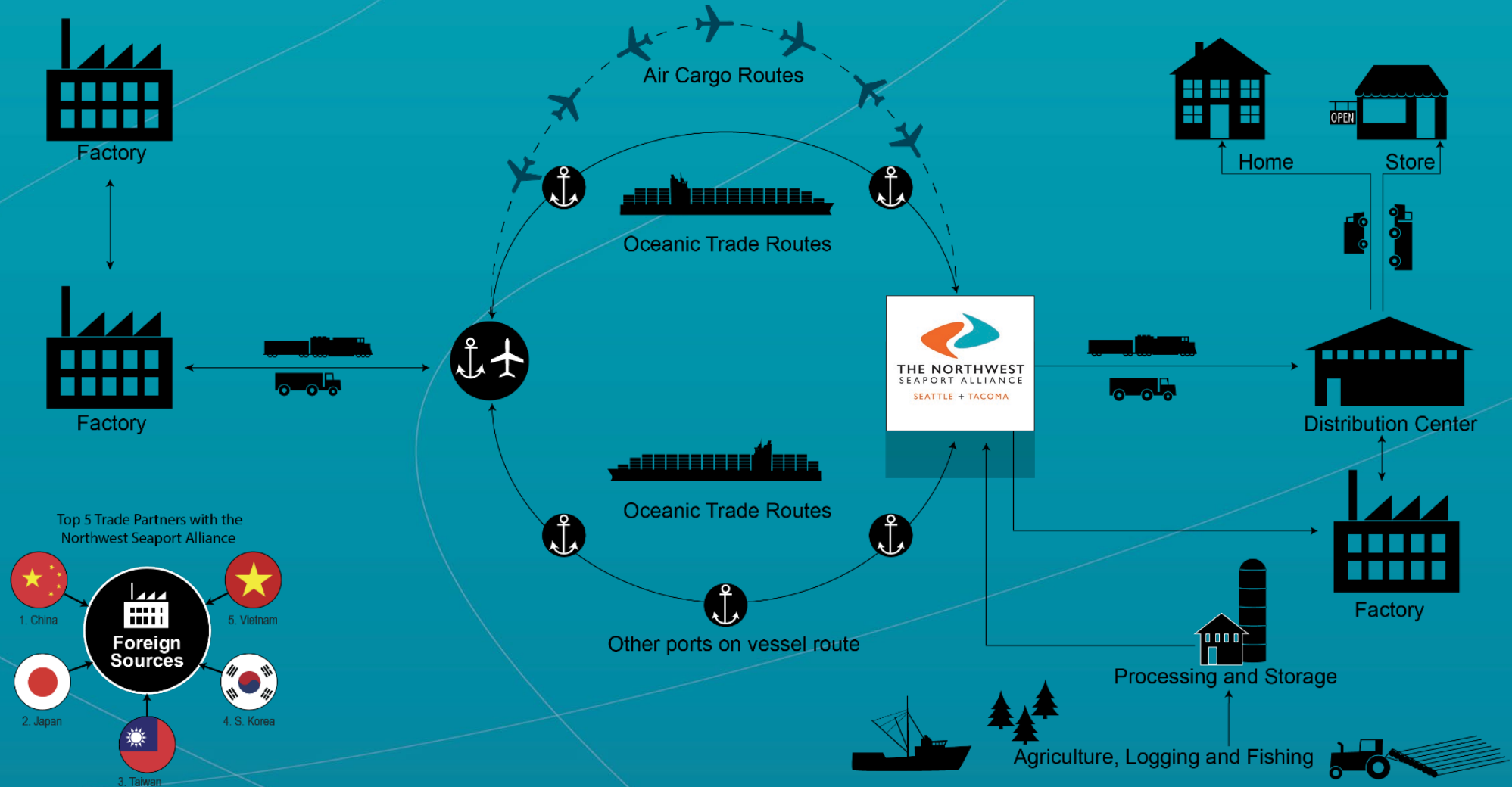


ECONOMIC IMPACT

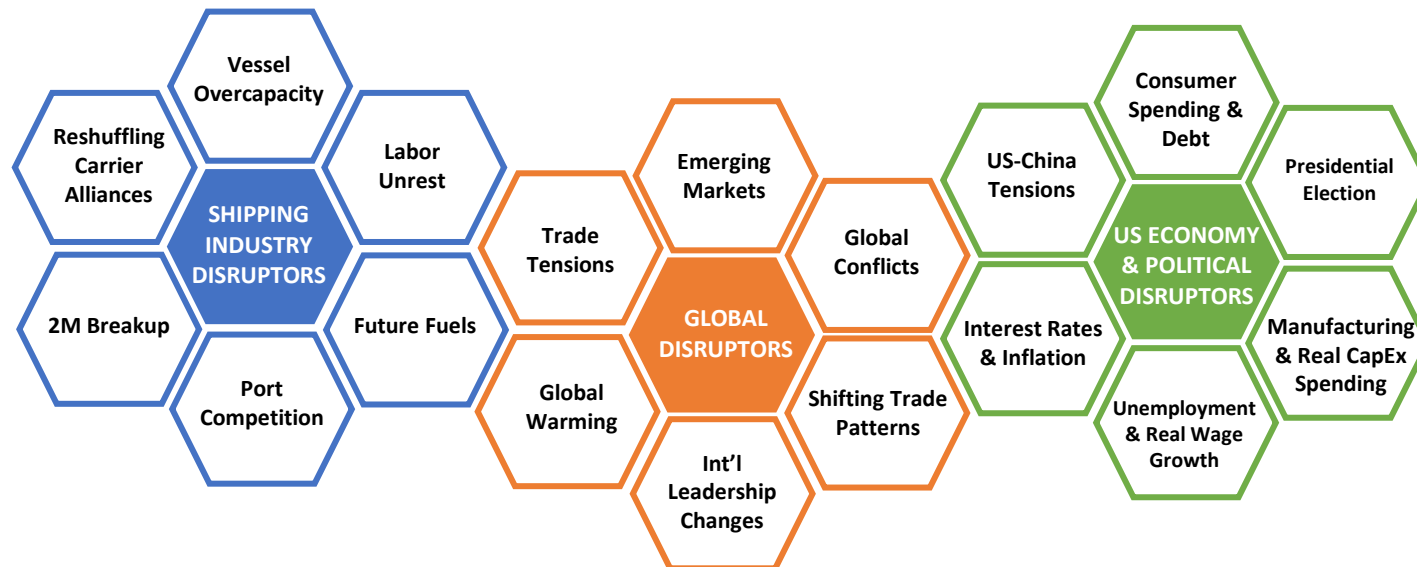
- \$12.4 Billion in Economic Impact in Washington State
- \$136 Million in State Tax Revenue



A Port's Role in the Global Logistics Supply Chain



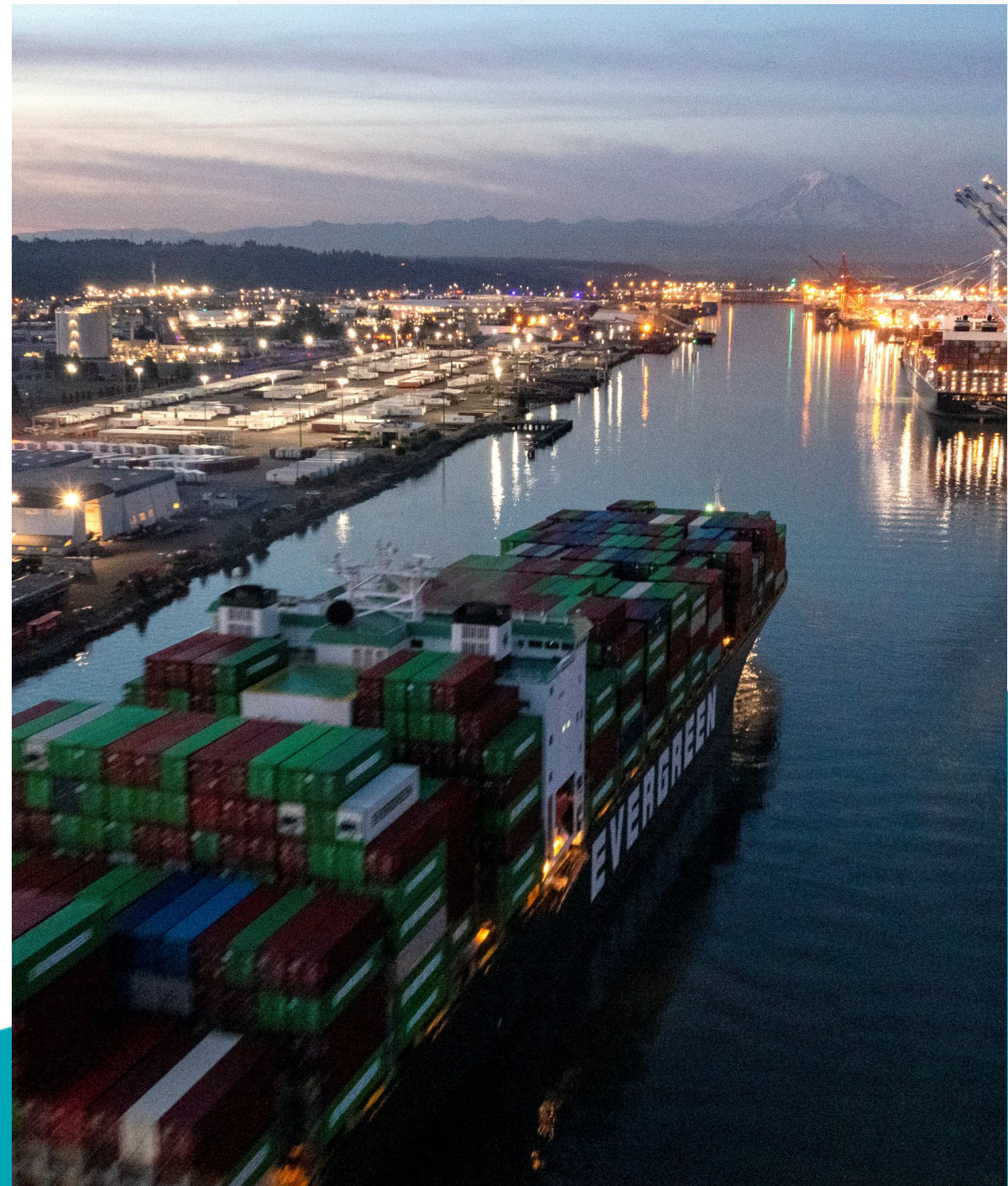
Global Supply Chain Influencers



Macro Environment

Impacts to Global Trade

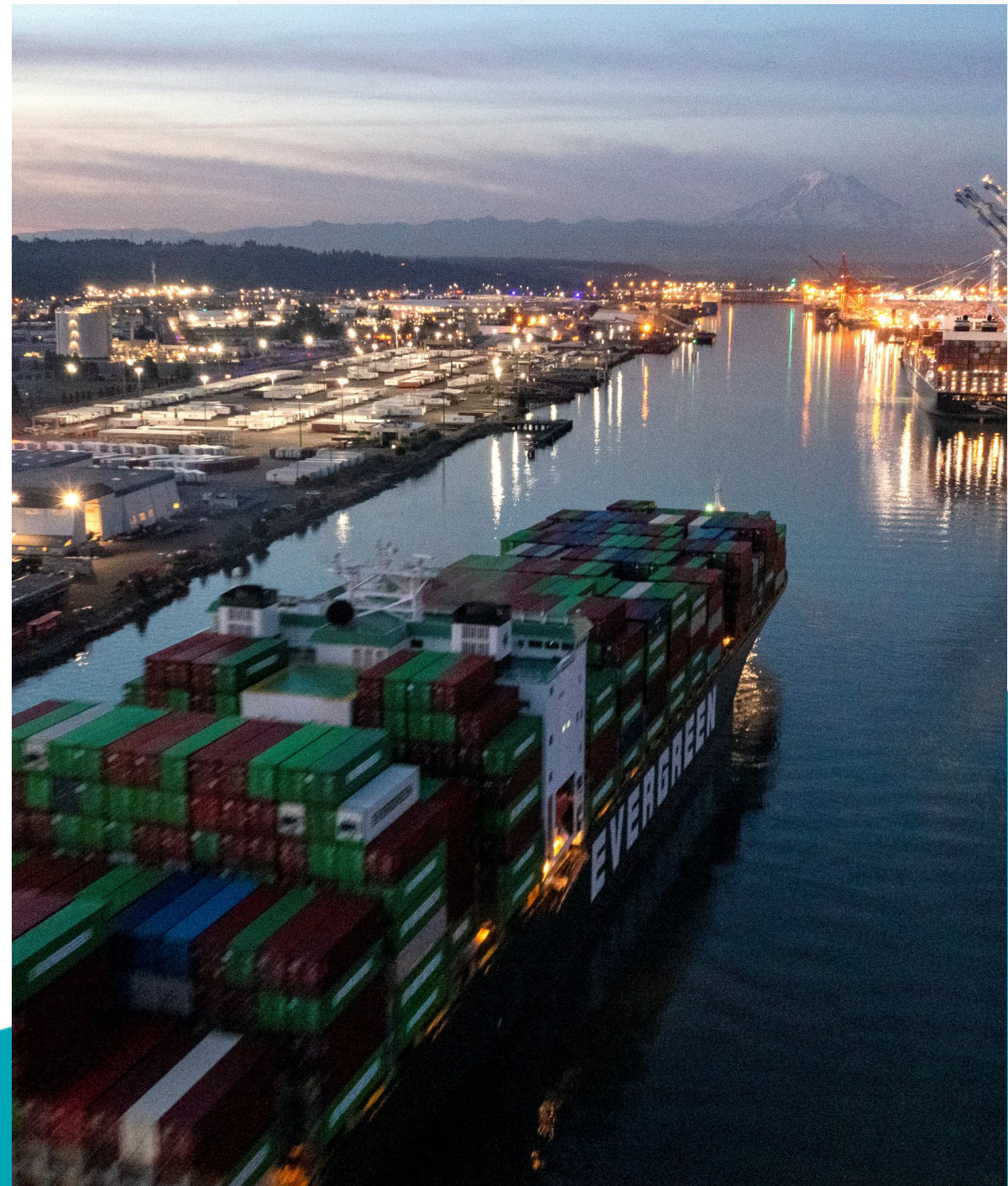
- Trade Tensions & Uncertainty
 - China / Red Sea
- Emerging Markets
 - Vietnam, Indonesia, India, Mexico
- Shifting Trade Patterns
 - SE Asia
- Vessel Capacity/Global Demand
 - Ocean Rate Volatility
- Future Fuels
 - LNG, Methanol, Hydrogen, Ammonia



Macro Environment

Impacts to the US

- Port Competition
 - Canada / Gulf & East Coast
- Interest Rates & Inflation;
Consumer Spending / Employment
Wage Growth
- Political climate / Tariffs



NWSA 2024 Cargo Activity



Containers
3,340,733 TEUs



Breakbulk/Project Cargo
402,681 MT

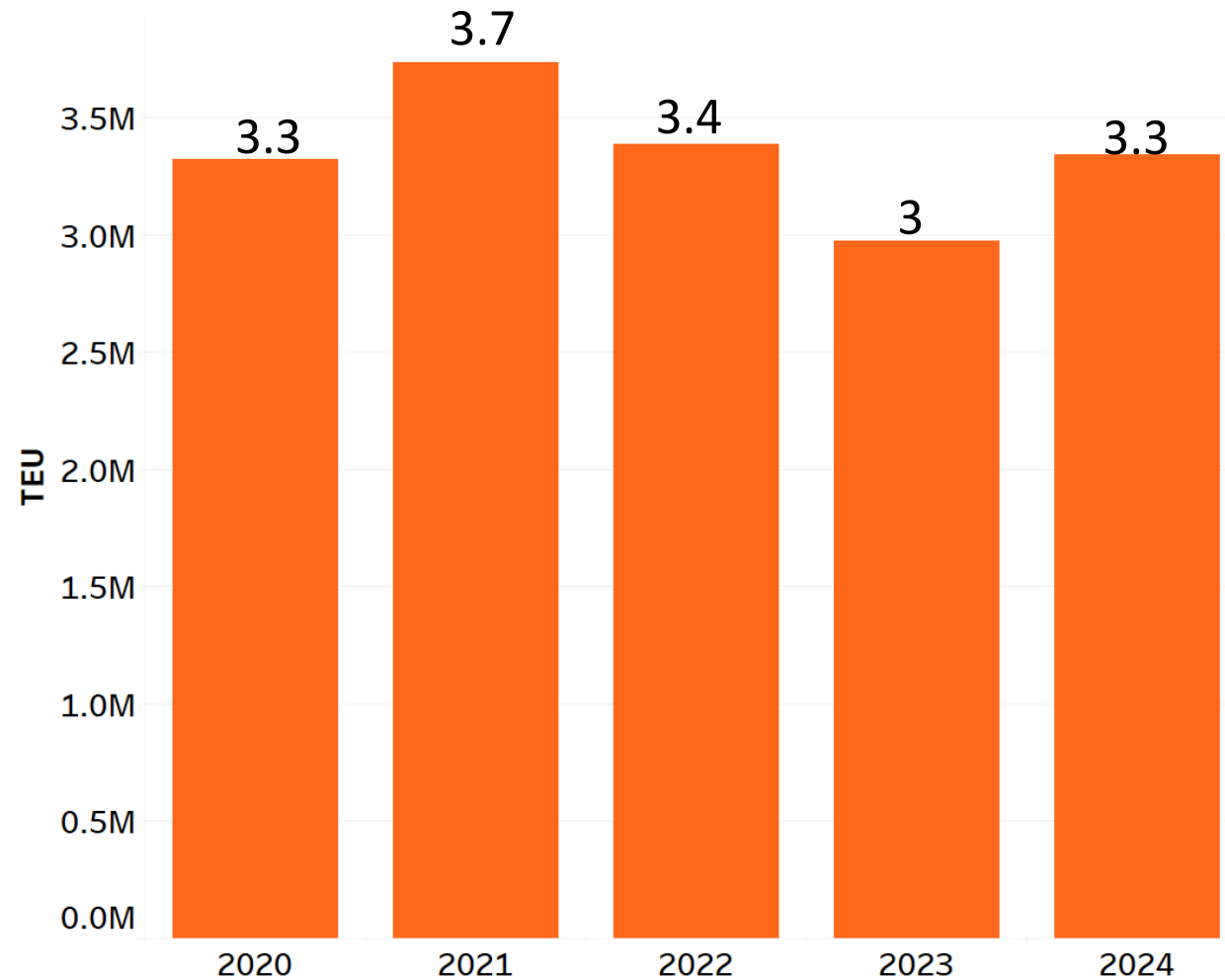


Autos
337,749 Units

Total Tonnage --- 25,592,258 Metric Tons

NWSA Container Volumes

2020 - 2024

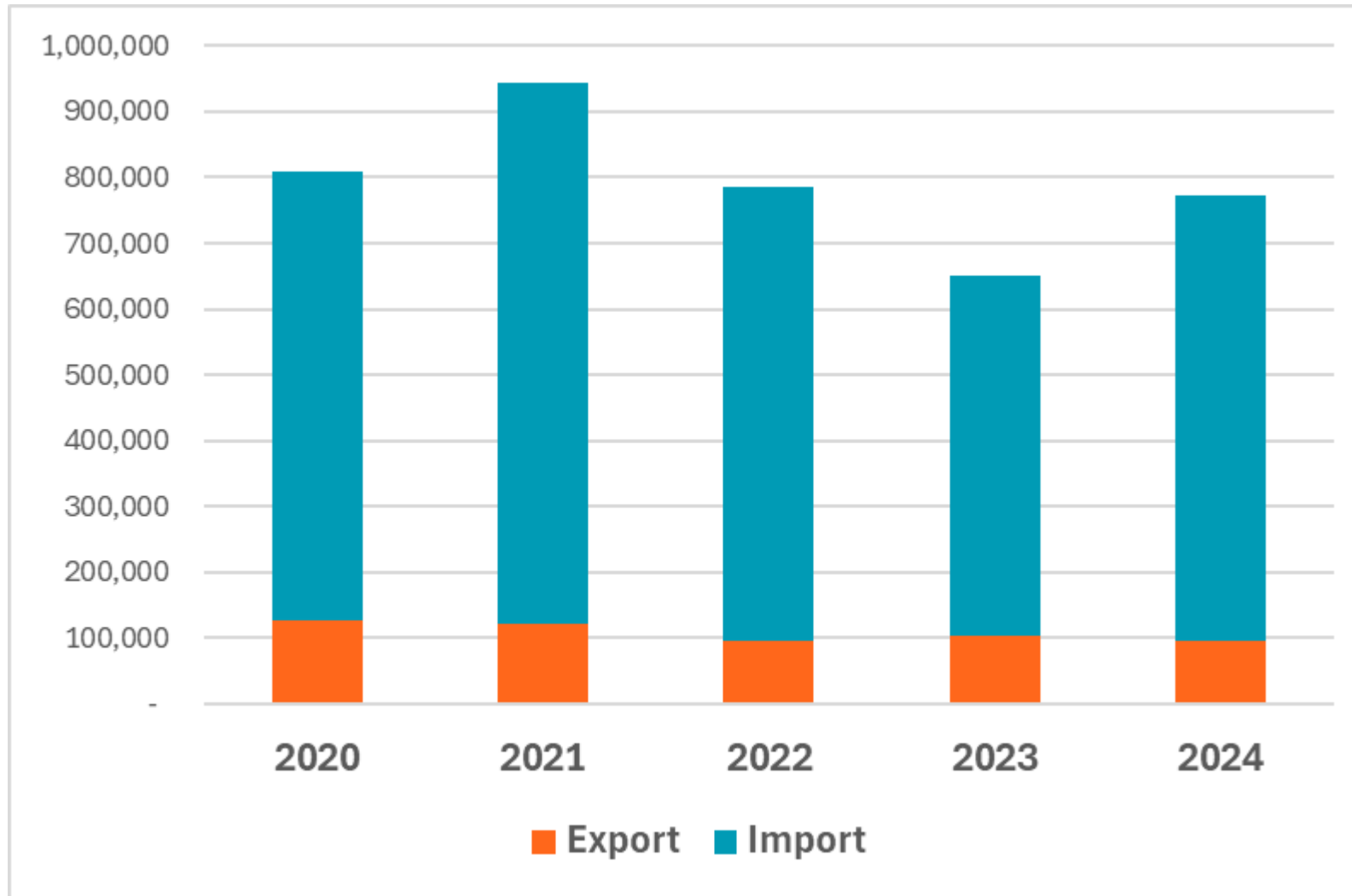


2024 NWSA Top Trading Partners

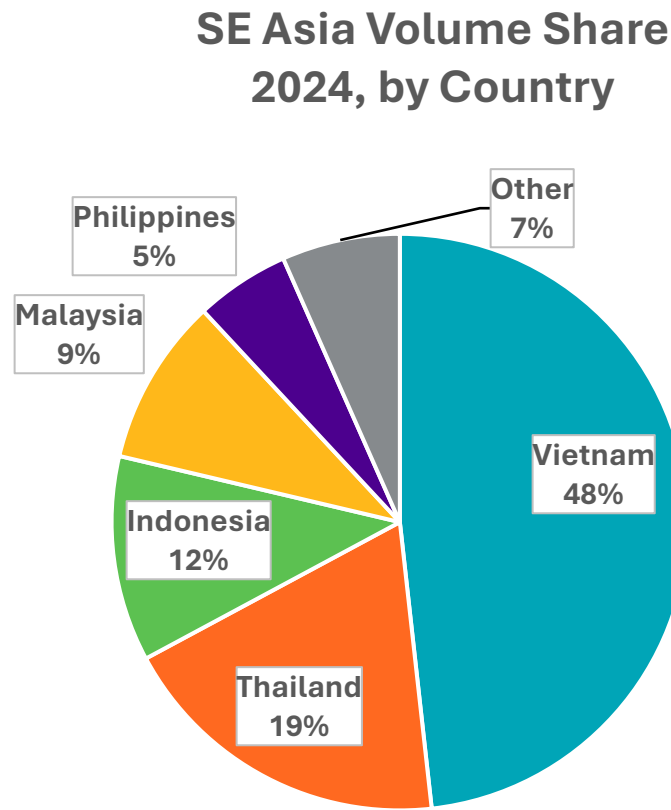
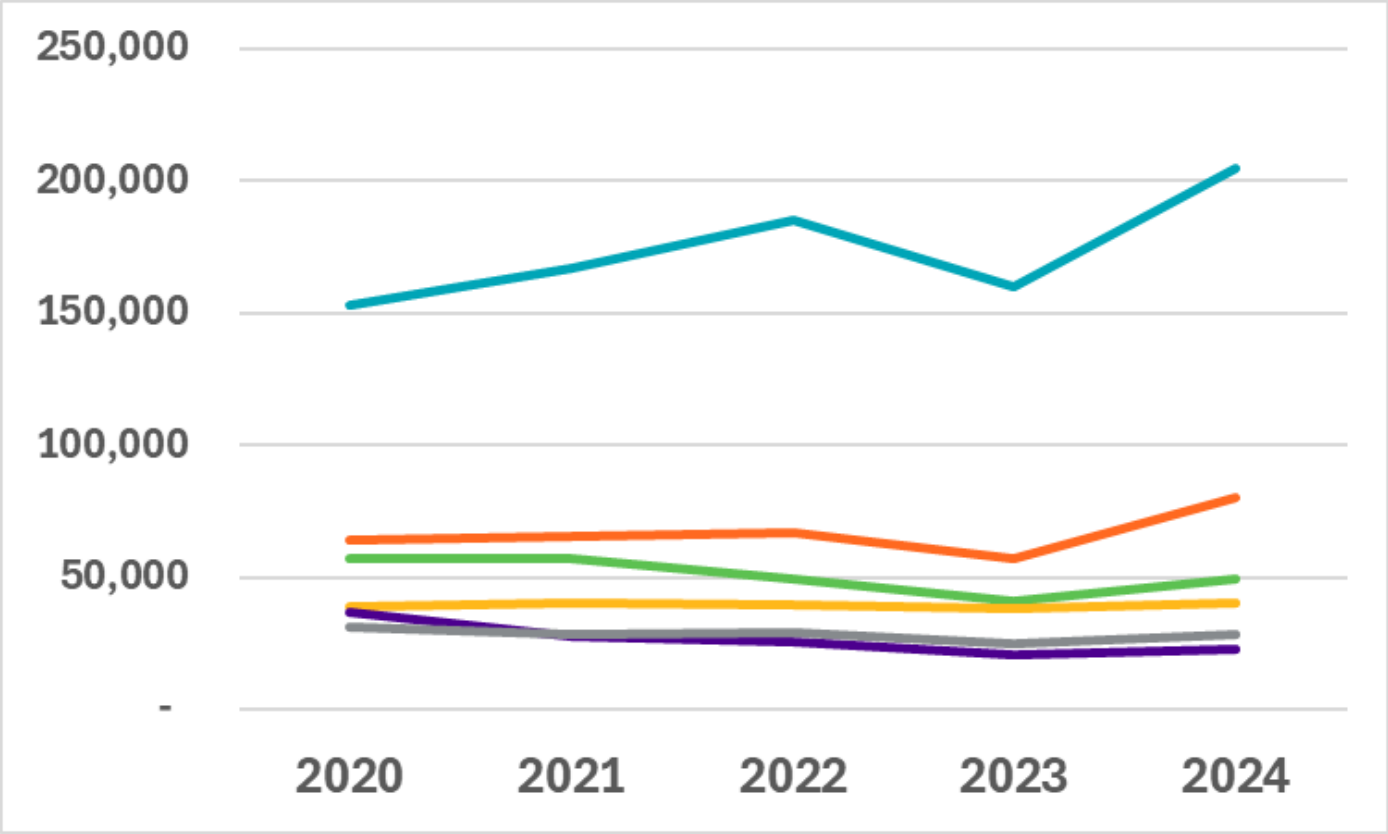


Imports			Exports		
1.	China	677,071 TEU	1.	Japan	136,847 TEU
2.	Vietnam	184,457 TEU	2.	China	96,411 TEU
3.	Japan	86,184 TEU	3.	South Korea	85,620 TEU
4.	South Korea	78,823 TEU	4.	Taiwan	62,289 TEU
5.	Taiwan	55,555 TEU	5.	Thailand	26,007 TEU
Total Container Volume – 1,319,521 TEU			Total Container Volume – 611,806 TEU		
(Foreign Full TEUs; Jan – Dec '24, All Trades)					

NWSA TEU Trade with China



NWSA Trade with SE Asian Countries



Source: PIERS (Foreign Full TEUs)

How We Compete and **Where** We are Headed

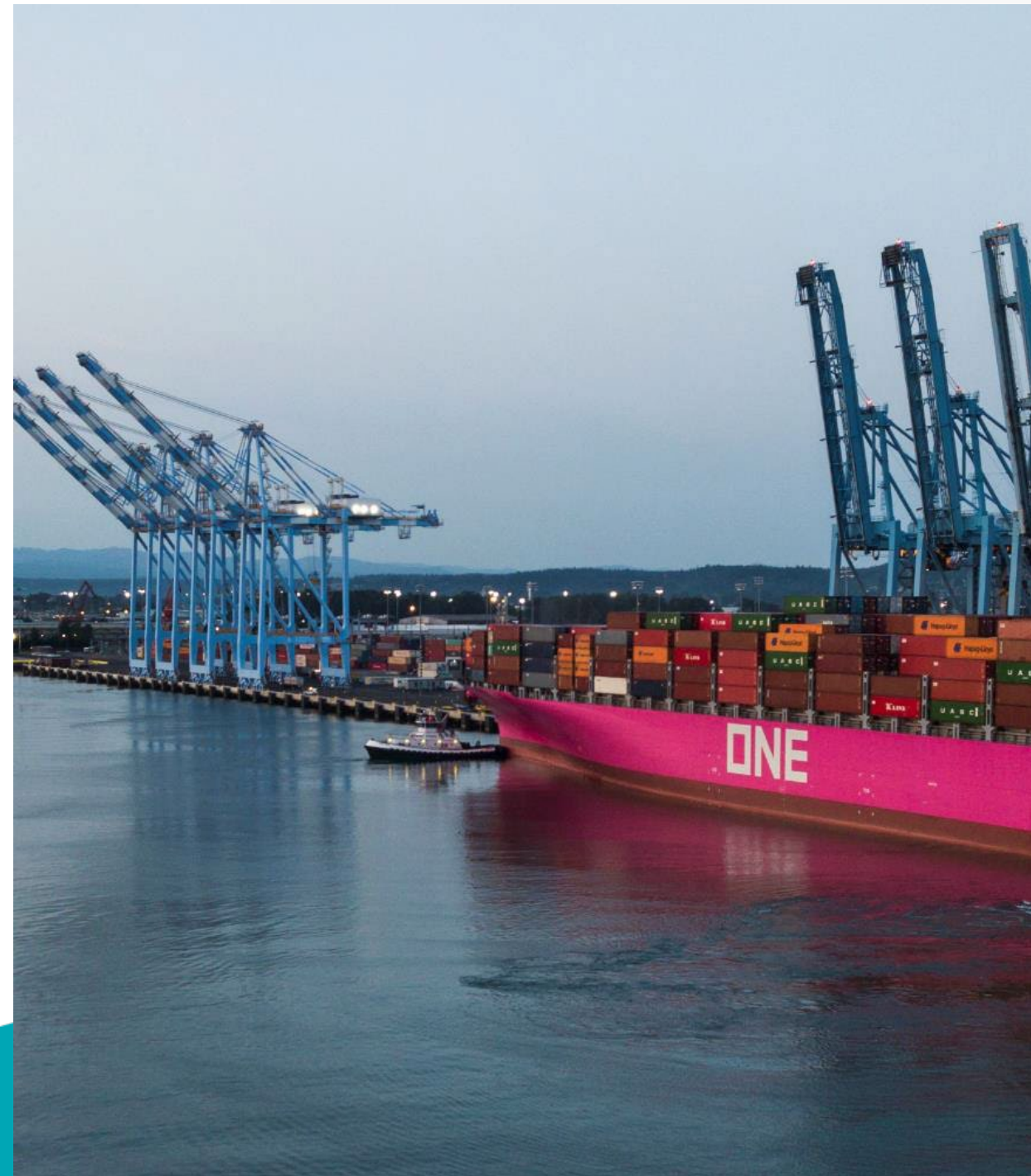
Operational Excellence

Customer Service

Cargo Diversity

Infrastructure Investments

Environmental Investments



Best-in-Class: Operational Excellence & Customer Care

A service commitment in partnership with our Labor, Marine Terminals and Railroads

Operations KPI Targets

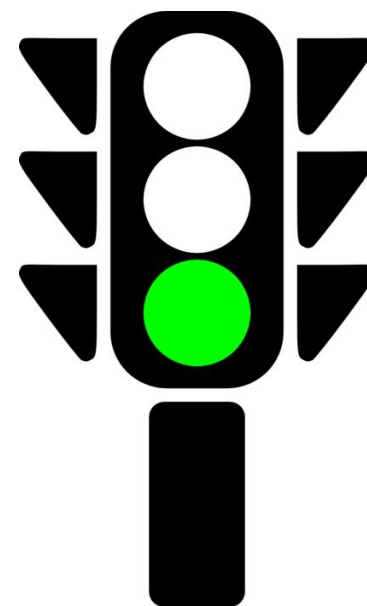
Vessel On-Time Performance
90%

Rail Dwell Time
3 Days

Local Trucker Turn-Time
60 minutes

NWSA GATEWAY STATUS - **FLUID**

- ✓ No berth congestion
- ✓ On-dock + near-dock rail; ample rail car supply
- ✓ 3.2-day import rail dwell
- ✓ Fluid rail and road networks
- ✓ Guaranteed, fixed-day vessel service from Vietnam
- ✓ Supply chain visibility



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.

- Service and ease of doing business remain a key NWSA focus
 - Engaged Business Development & Ops teams to support, troubleshoot, provide info
 - Accessible and collaborative terminal partners
 - Increased visibility to information: GPO
- BCOs value this engagement & support
 - Award winner in the Ease of Doing Business Category (Logistics Management).
 - Increasing volume allocations to the NWSA

It's so refreshing to see terminals getting involved and sharing info with stakeholders. Small exporters here appreciate NWSA, what the team does, and the efforts being made to proactively share information.

- Vice President, Logistics (BCO exporter)

The NWSA is my favorite port to work with by far. It is easy to do business there, I wish I had more cargo to route through the NWSA.

- Director, Import Transportation & Trade Compliance
(BCO importer)

From day one the experience with the NWSA felt unique – true collaboration, engaged problem solving, and a real investment in our success in the PNW.

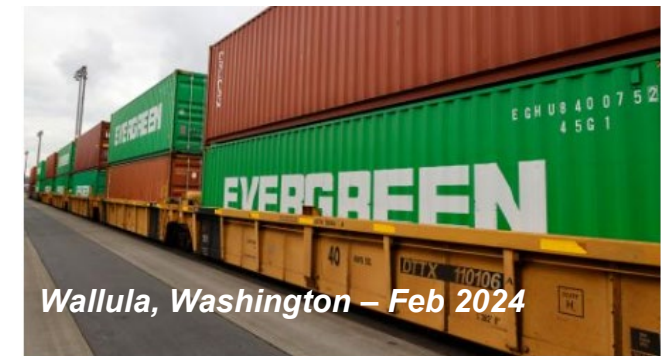
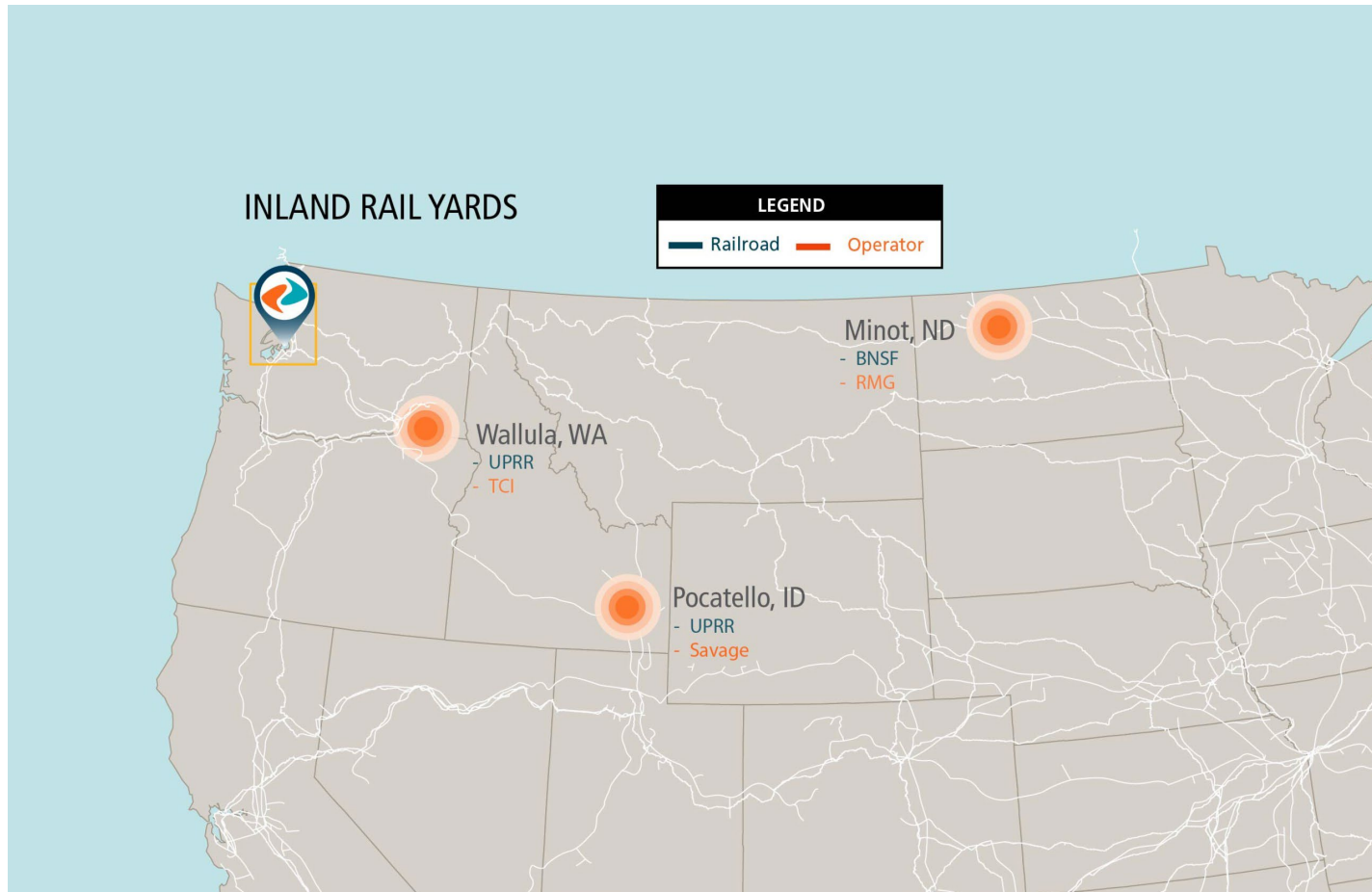
- President (ocean carrier)



THE NORTHWEST
SEAPORT ALLIANCE
SEATTLE + TACOMA

Inland Rail Hub Development

- Supports export volume growth through expanded capacity and services
- Leverages inland hubs to establish import and two-way rail service



A Diversified Portfolio – Non-Container Cargo

Breakbulk & Heavy Lift

Specialty Cargo



Over Dimensional Cargo



Energy Projects



Construction Equipment



Agricultural Equipment



Boats & Tugs



Steel



Military Cargo



Special Projects

Infrastructure Investments

Tacoma Harbor

- ❖ Expansion and enhancements at Husky, WUT Terminals
- ❖ Off-Dock Container Support Yard
- ❖ Tacoma Harbor Deepening
- ❖ Strategic Land Acquisitions
- ❖ New Terminal Development Opportunities
- ❖ SR 167 Expansion

Husky Terminal

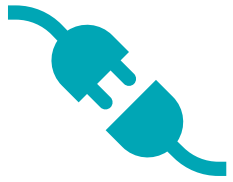
Seattle Harbor

- ❖ Terminal 5 Phase Two
- ❖ Terminal 46
- ❖ Seattle Harbor Deepening
- ❖ Strategic Land Acquisitions

Terminal 5



Carbon - 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 2040.

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.



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Thank You!



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