

Trade and Economic Trends: Port & MTO Response

AAPA Marine Terminal Management Training

Long Beach • October 1, 2018

Dr. Noel Hacegaba
Deputy Executive Director

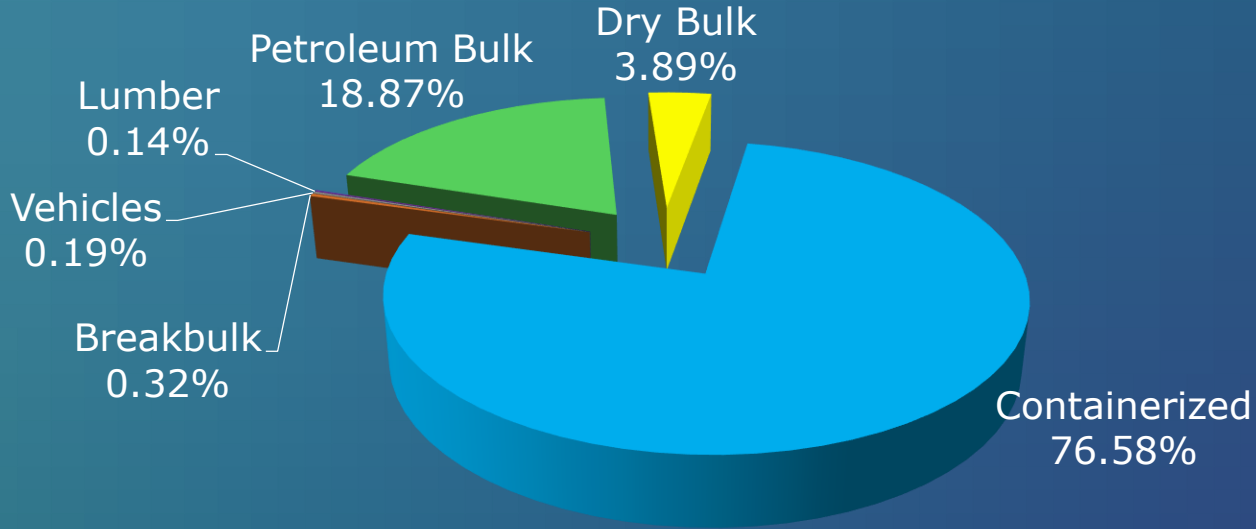


Outline

- POLB business profile
- State of trade
- Ocean carrier industry trends
- Supply chain disruption
- Q&A

POLB CARGO PROFILE

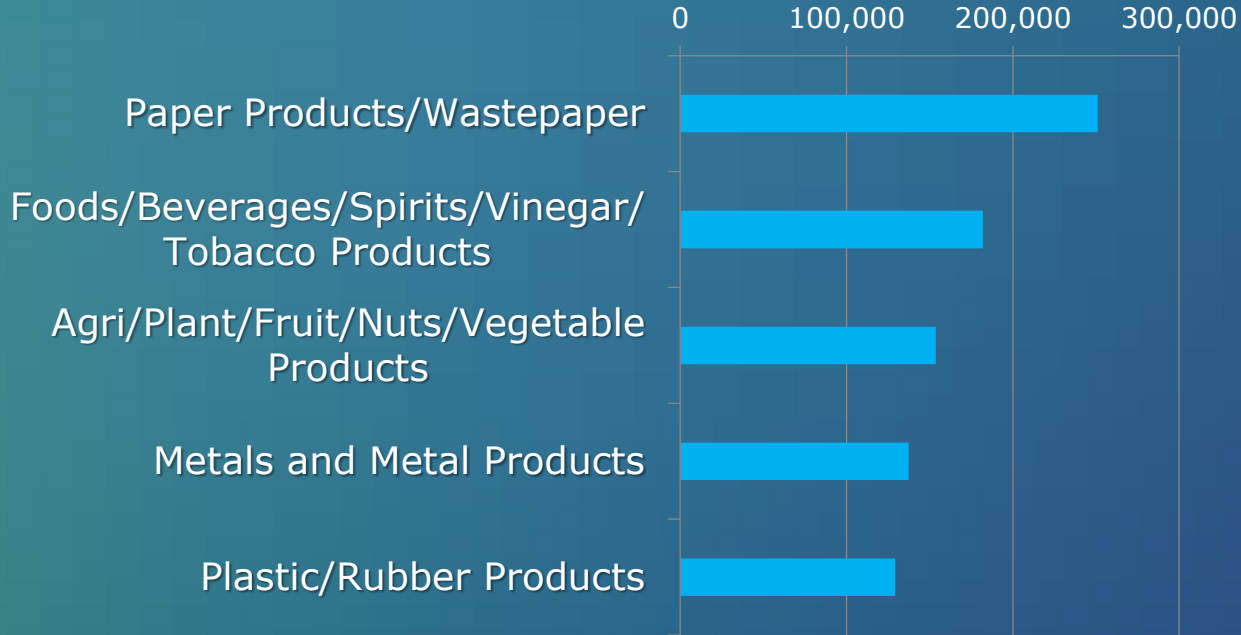
BASED ON METRIC REVENUE TONS



TOP IMPORTS



TOP EXPORTS



Non-container Lines of Business

	CY2017	CY2016	% Change	FY2018 YTD*	FY2017 YTD *	% Change
<u>Liquid Bulk</u>	33,790,468	30,912,768	<u>9.31%</u>	21,185,560	21,248,044	<u>-0.29%</u>
<u>Dry Bulk</u>	7,676,140	6,334,386	<u>21.18%</u>	5,305,268	4,662,532	<u>13.79%</u>
<u>Break Bulk (Including SAR)</u>	758,480	555,671	<u>36.50%</u>	611,420	436,750	<u>39.99%</u>
<u>Break Bulk (Less SAR)</u>	698,854	533,349	<u>31.03%</u>	549,719	415,079	<u>32.44%</u>
<u>Automobiles (Units)</u>	320,373	309,716	<u>3.44%</u>	276,632	283,901	<u>-2.56%</u>
<u>Lumber</u>	264,030	258,526	<u>2.13%</u>	159,226	168,781	<u>-5.66%</u>

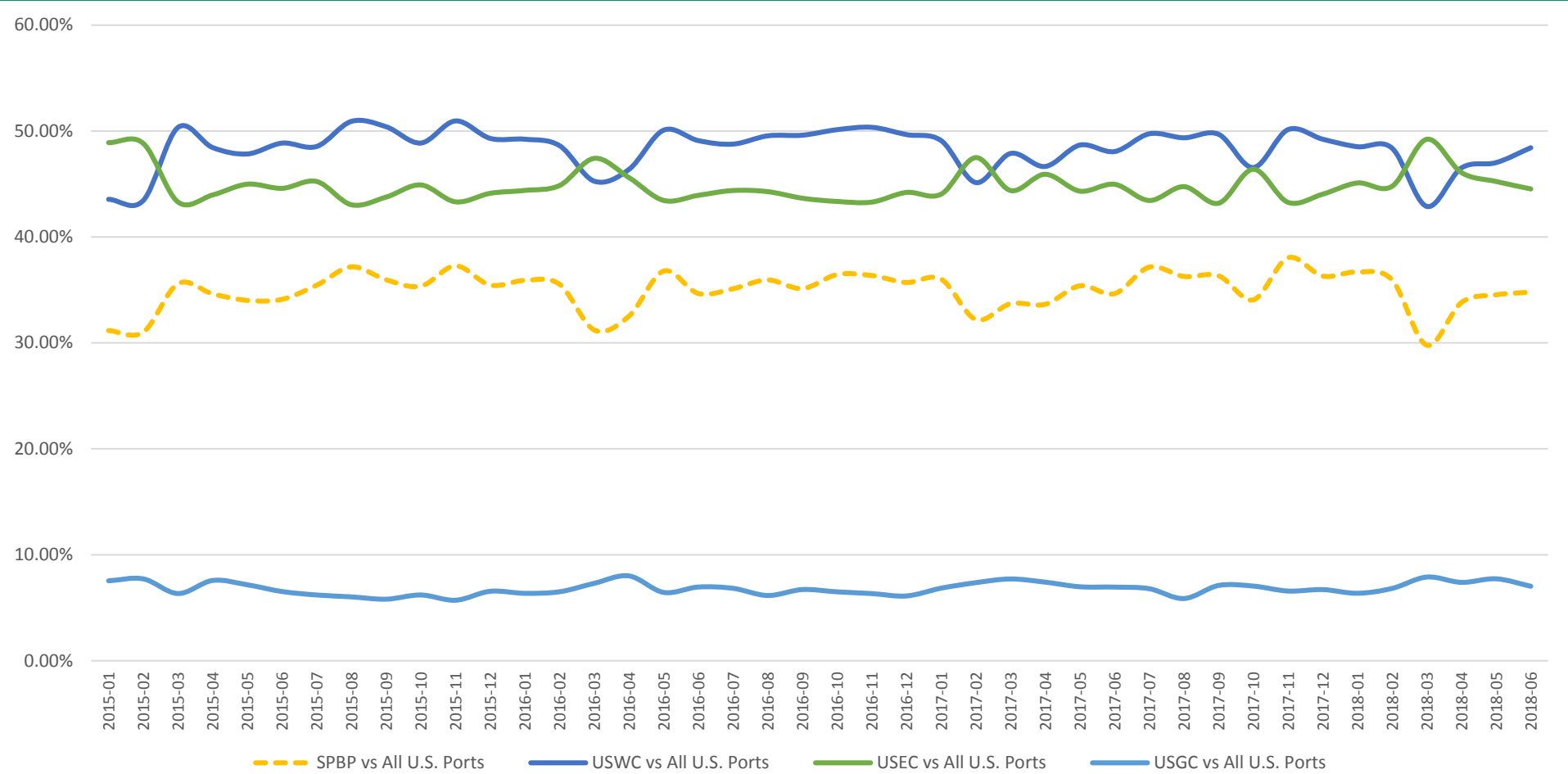
Container Volumes

	CY2017	CY2016	YOY %	FY2018 YTD*	FY2017 YTD*	YOY %
TEU Growth	7,544,507	6,775,171	11.36%	6,620,182	5,836,765	13.42%

* October 2017 – July 2018

Monthly Container Volumes

CY2018 vs CY2017	JAN	FEB	MAR	APR	MAY	JUN	JUL
CY2018 volume	657,830	661,790	575,258	618,438	687,427	752,188	688,457
Monthly YOY%	12.90%	32.81%	13.83%	10.83%	6.04%	14.19%	-4.42%
Cumulative CYTD %	12.90%	22.07%	19.45%	17.20%	14.61%	14.53%	11.26%



The "Trade War"



The Global Supply Chain

Global Goods Trade



Potential Tariff Exposure

	Value of Goods	Cargo Exposure	Cumulative Exposure	Effective Date
List 1 Import	\$34 billion	5%	5%	07/06/2018
List 1 Export	\$34 billion	5%		
List 2 Import	\$16 billion	2%	10%	08/23/2018
List 2 Export	\$16 billion	14%		
List 3 Import	\$200 billion	22%	29%	09/24/2018
List 3 Export	\$60 billion	7%		

Big Ships...





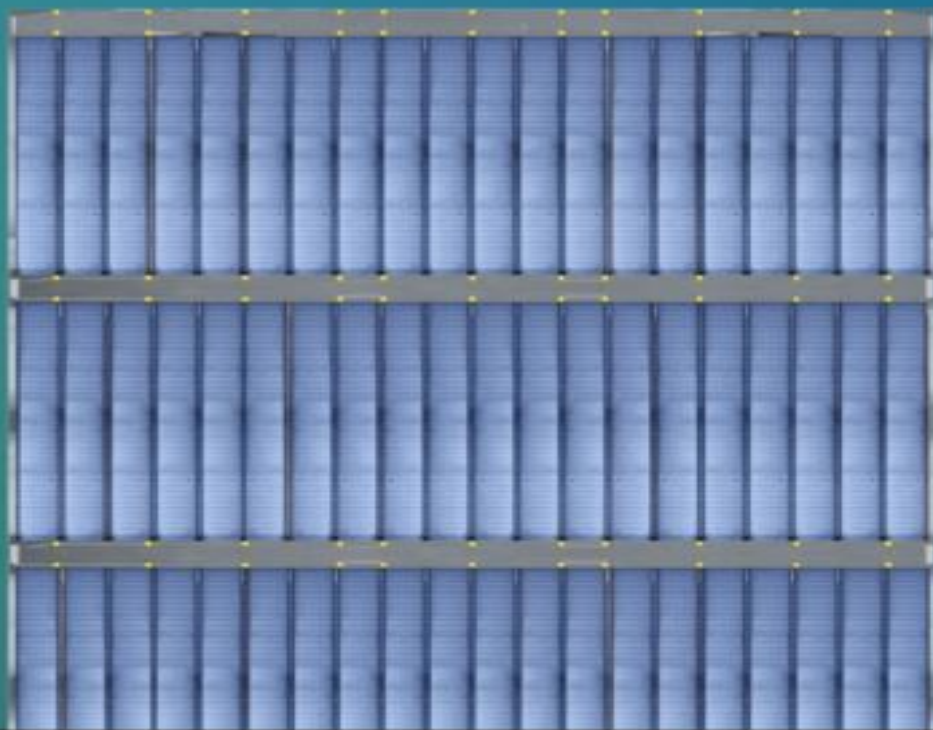
**The CMA CGM
BENJAMIN FRANKLIN is...**



20 STORIES TALL

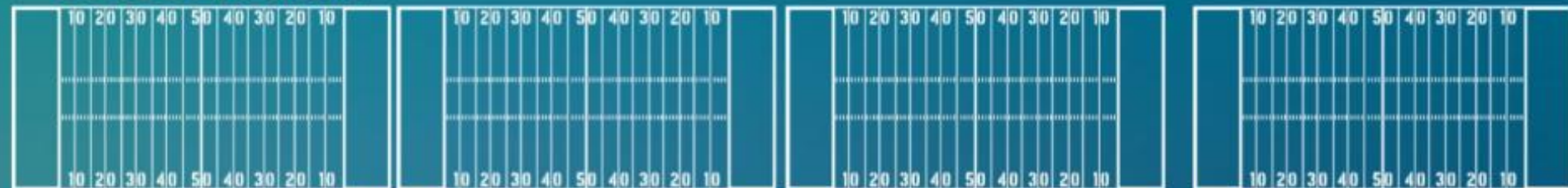


as **WIDE** as



a **12-LANE**
FREEWAY

LONGER than



FOUR Football
Fields

ROOMY ENOUGH for



90
MILLION
pairs of shoes

Current Alliance Structure



OCEAN
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ALLIANCE



THE
ALLIANCE



INDEPENDENT
CARRIERS

Consolidation continues....



Consolidation continues....



The Amazon effect





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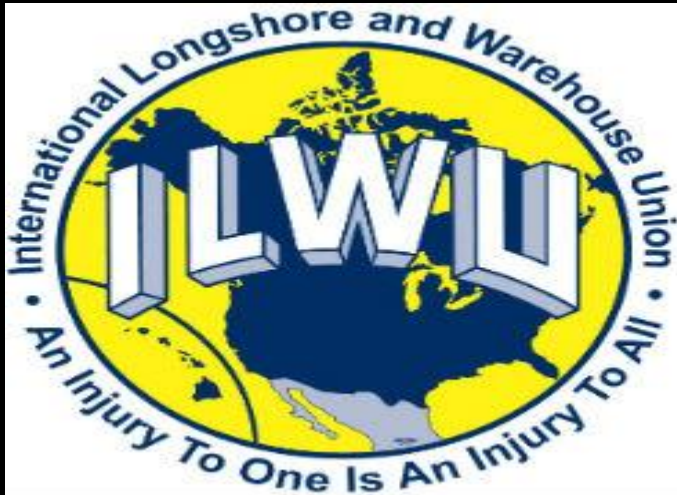
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ILWU contract extension would protect US West Coast routings

Bill Mongelluzzo, Senior Editor | May 01, 2017 6:53PM EDT



DR. NOEL HACEGABA
DEPUTY EXECUTIVE DIRECTOR

NOEL.HACEGABA@POLB.COM



@PortofLB



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