

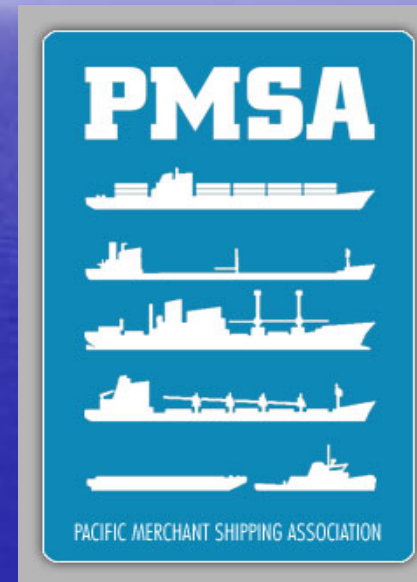
# 2009 AAPA Marine Terminal Management Training Program

September 21, 2009  
Pacific Merchant Shipping Association  
(PMSA)

# Pacific Merchant Shipping Association

**Michele Grubbs**

**Vice President  
Southern California  
Office**



# Pacific Merchant Shipping Association PMSA

- Ocean Carriers and Terminal operators
- Represent 90% of West Coast Containerized Cargo
- San Francisco - LA/Long Beach – Seattle
- Government, legislative and regulatory affairs





# Disclaimer

Speaking as an individual from an industry perspective, but not on behalf of any specific company



# Top 10 Port Qualities Important to Customers



**LATE SHOW**  
*with David Letterman*

# #10

## Location-Location-Location

- Fast Access to Population Centers
  - So Cal Large Population Base
  - Transit Times
- ✓ Canada – Marketing transit times





# #9

## Vessel Access

- Safe
- Berth availability
- Deep water +50'
- Easy navigation
- Pilotage



✓ Panama Canal 2014

# #8 Productivity

- Reliable Labor
- Efficient operations
  - Moves/Hour
- Stable, experienced work force

✓ Jobs!!

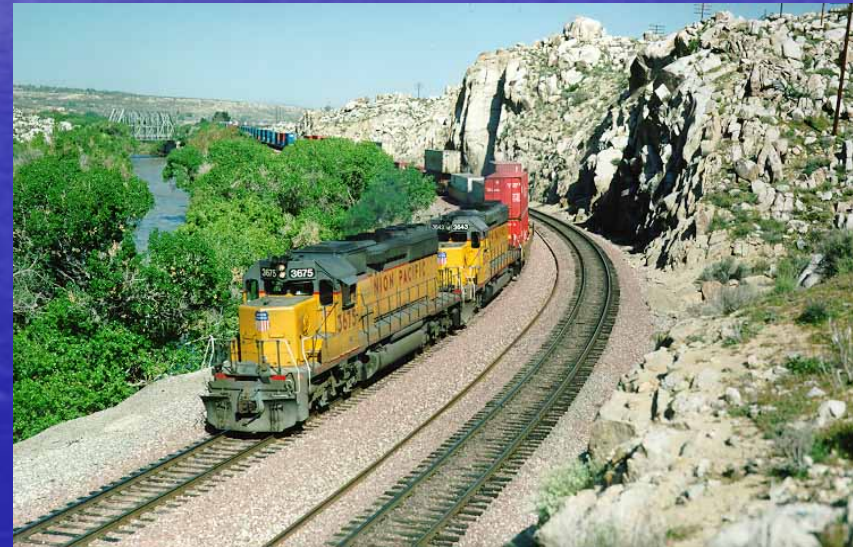




# #7

## Access to Rail

- On Dock rail
  - Near Dock rail
  - Intermodal connectors
  - Dual Class 1 coverage
- ✓ Rail Options may drive alternatives



# #6

## Port Trucking

- Good access to terminals
- Supply of truckers
- Clean Truck Plan

✓ Employee  
Mandate?





# #5

## Infrastructure

- Highway & Roads
  - Bridges
  - Truck Access
  - Stimulus & Bond Funds
- ✓ Reauthorization of the Highway Bill



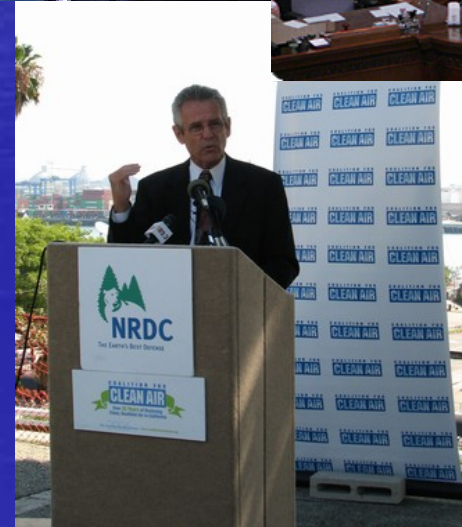


# #4

## Positive Political Climate

- Proactive to Develop Business
- Want the Jobs
- Focus on Economic Benefits

✓ *Government mandates*



# #3 Growth Opportunities

- EIRs are Critical
  - Limited Land Available
  - Technology
  - Leadership
- 
- ✓ East Coast, Southeast, Gulf Coast, Canada, Mexico, Panama Canal Port Development





# #2

## Economics

- Commodity Market
- Cost Competitive
- Intermodal Pricing
- Lease Rates

✓ \$10/TEU – Does  
make a difference!

### RECENT HEADLINES:

**"First-Half Liner Losses Pass \$6 Billion"**  
*The Journal of Commerce (September 8, 2009)*

**"Idle Box Fleet Heading for 2 Million TEUs"** *The Journal of Commerce (July 14, 2009)*



#1

# Port Partnership

Long Term Commitment

- Communication
- Focus
- Consistency
- Understanding our Business

✓ Customer Relationships Key



# Pacific Merchant Shipping Association

Thank you!