

Port of Seattle Mission



The Port of Seattle is a public agency whose primary mission shall be to invest public resources to advance trade and commerce, promote industrial growth, stimulate economic development, and create jobs.

--adopted August 2009

Century Agenda “Givens”

- Airport: The existing three runways at Sea-Tac Airport are assumed as a maximum.
- Seaport: POS will continue to be a major international container, cargo, fishing & cruise Port, and the PNW will continue to be a major trade gateway. The on-dock container terminals will develop primarily through investments within the current property footprint.
- Funding Strategy: Over the next 25 years, the Tax Levy is an important funding mechanism for strategic opportunities which cannot be financed otherwise.

--as finalized 2/24/11, Century Agenda Committee and Port staff

Century Agenda: Proposed 2011 Calendar

	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
Century Agenda Committee 2 nd Tues		Media Round-table	Fostering Economic Growth	Moving Cargo: logistics and growing exports	Moving People: airport, cruiseships and tourism	Attracting next generation industries and jobs	Achieving our community values	Funding our strategic goals & putting real estate to work			Final C/A Presented & Approved
Commission	Monthly Commission Updates: developing preliminary strategic goals							Review Draft Century Agenda			Final C/A Presented & Approved
Public Outreach	Communication Plan, POS website & email box , Social Media/TBD --year long--								Public outreach on draft plan		
Centennial Events	Kickoff, Port District Act Commemoration, Banners, Combined Chambers 3/4		Earth Day, Commemorative Book, Sea Air School, Annual Reports, Maritime Festival, Bike Rally, Seaport Breakfast			Port 101 Series, Fishermen's Fall Festival, AAPA National Convention			Chamber Event, Holiday Card		

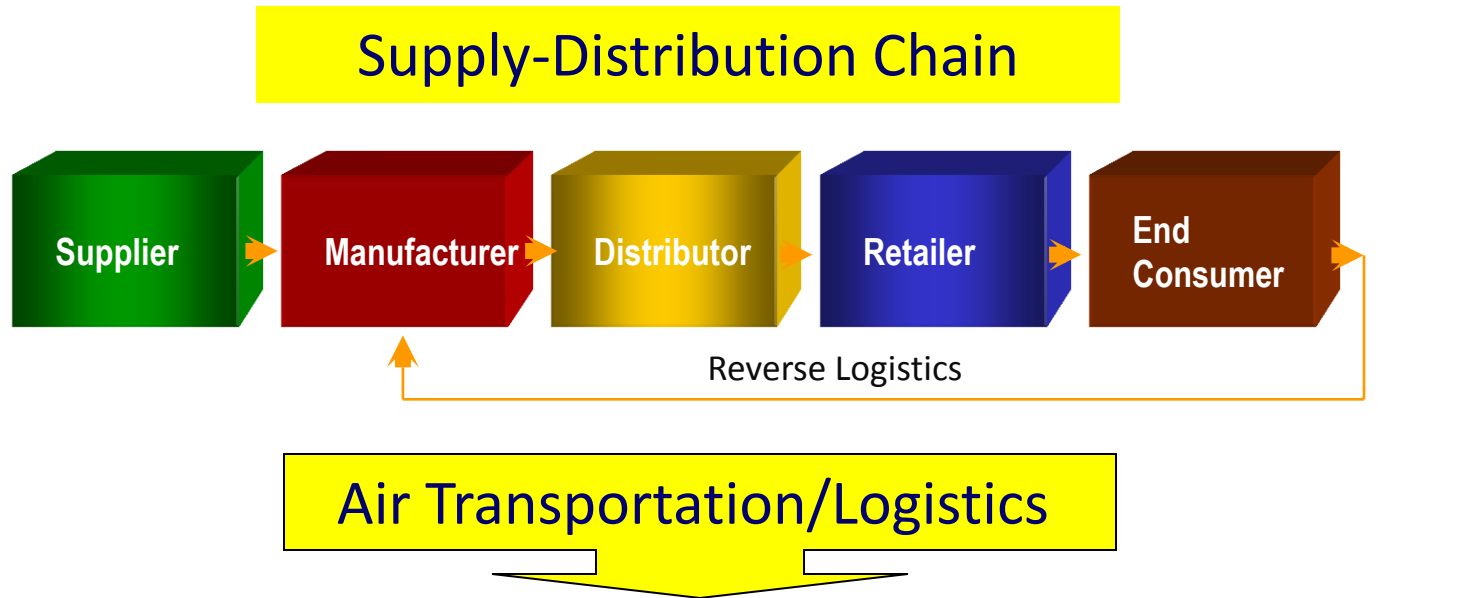
Air Freight is Big Business



- Over \$1 trillion is spent annually on domestic US transportation and logistics services
- Air freight accounts for 24 % of the total US merchandise trade value
- \$85 billion air freight & express market
- \$35 billion US domestic market
- Freight traffic growing about 6% per year worldwide
- Market size doubles every ten years



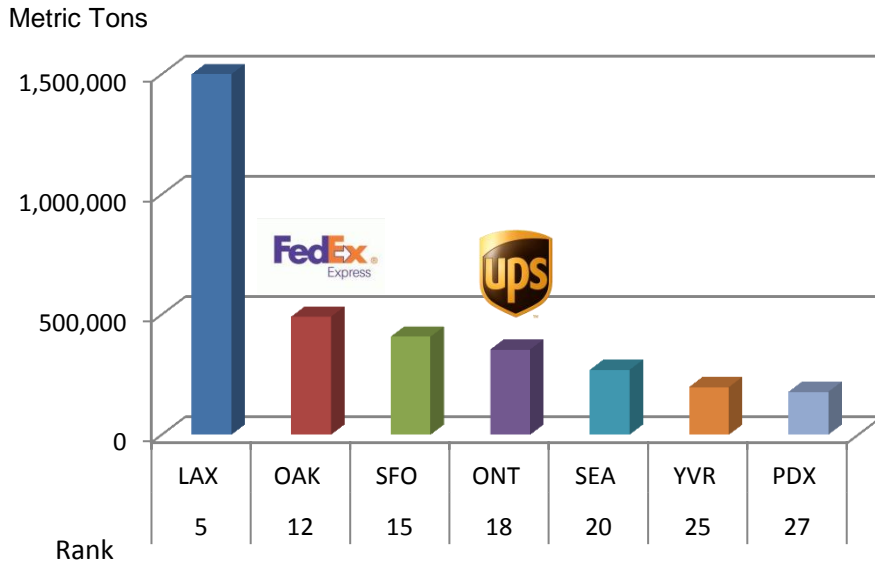
Cargo Industry Players



- Shippers
- 3PLs/4PLs
- Customs brokers
- Consolidators
- Indirect carriers
- General Sales Agents
- Gov postal authorities
- Motor carriers
- Air carriers
- Airports
- Cargo/Ground handlers
- Federal Inspection Agencies
- Consignees

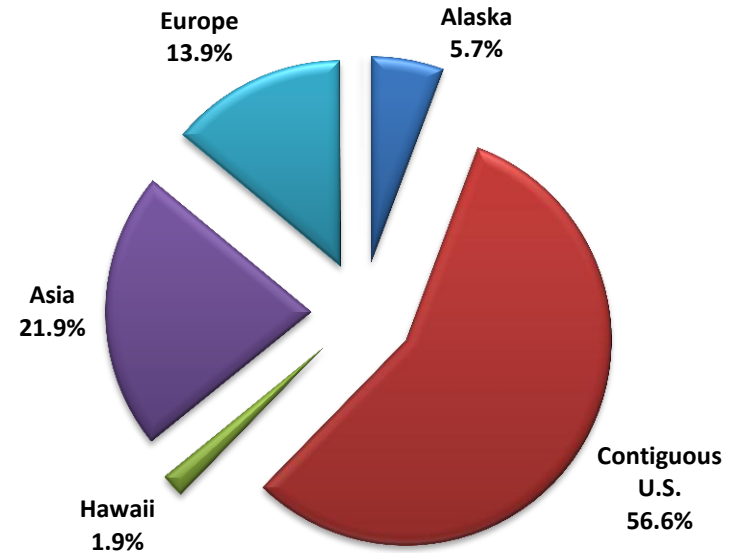
Air Cargo at Sea-Tac

3rd Largest International Gateway on the West Coast

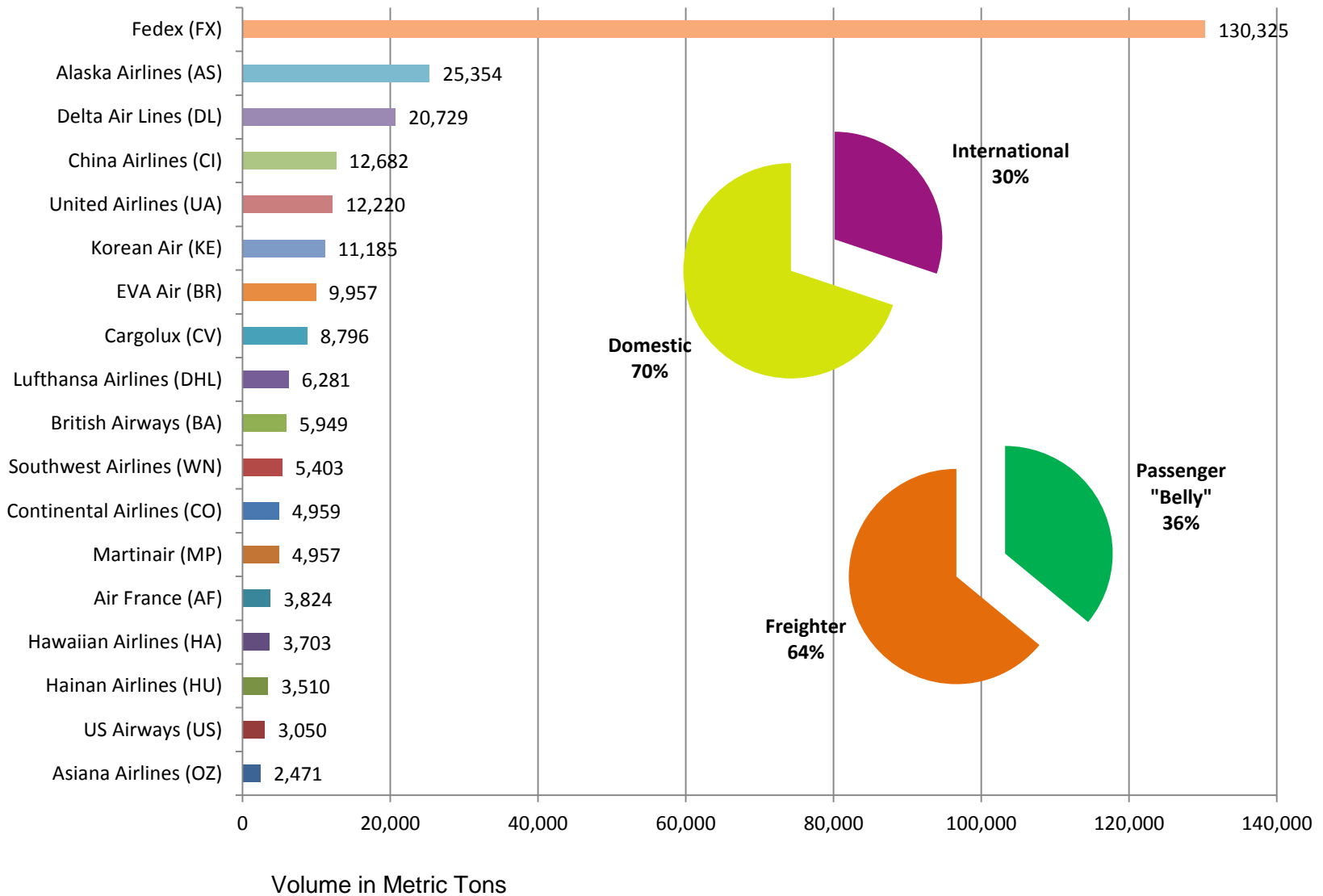


*based on 2009 tonnage

Origin and Destination Market Share

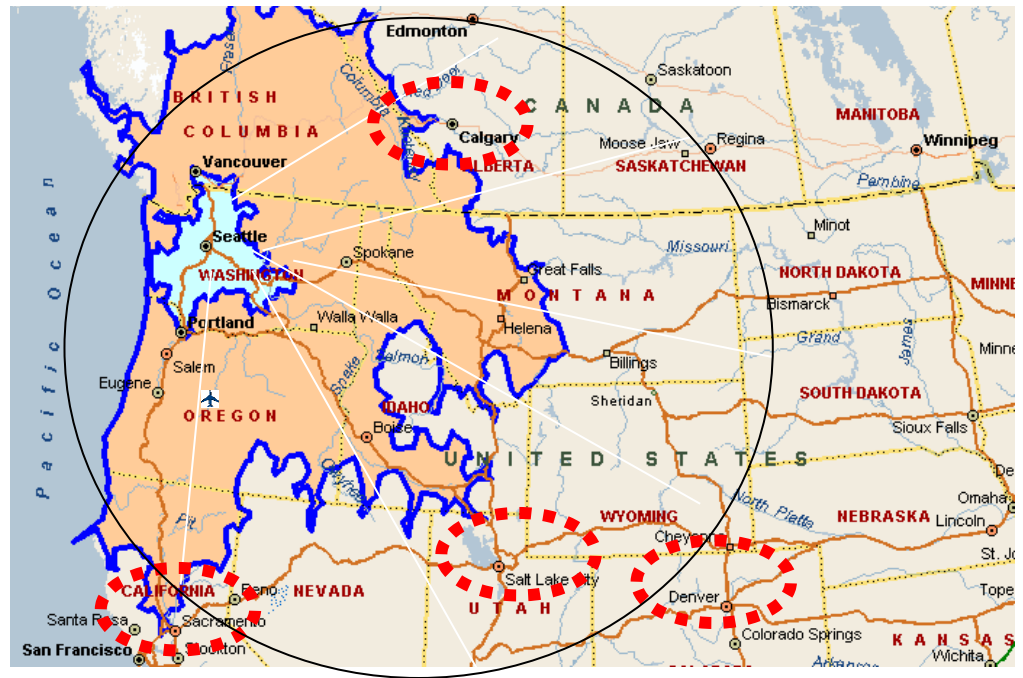


Air Cargo Market Share

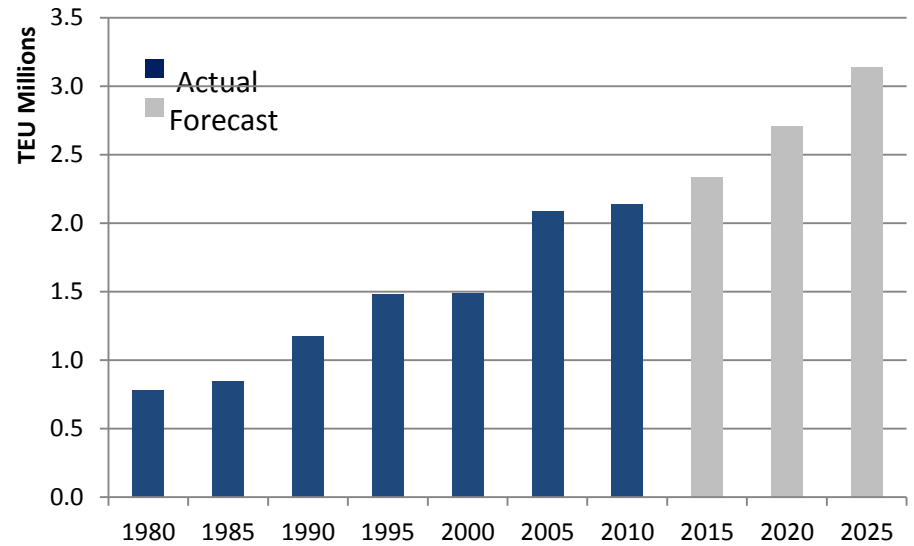


Top PNW Air Export Commodities

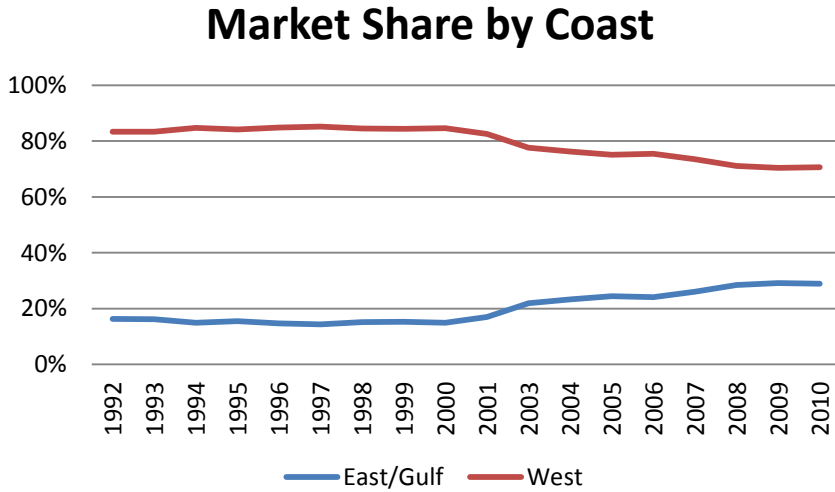
- Electric Machinery, TV & Sound Equipment
- Aircraft & Spacecraft Parts
- Optic, Photo & Medical Instruments
- Machinery & Parts
- Fish & Shellfish
- Fruits & Vegetables
- Footwear
- Plastics
- Plants, Bulbs & Cut Flowers



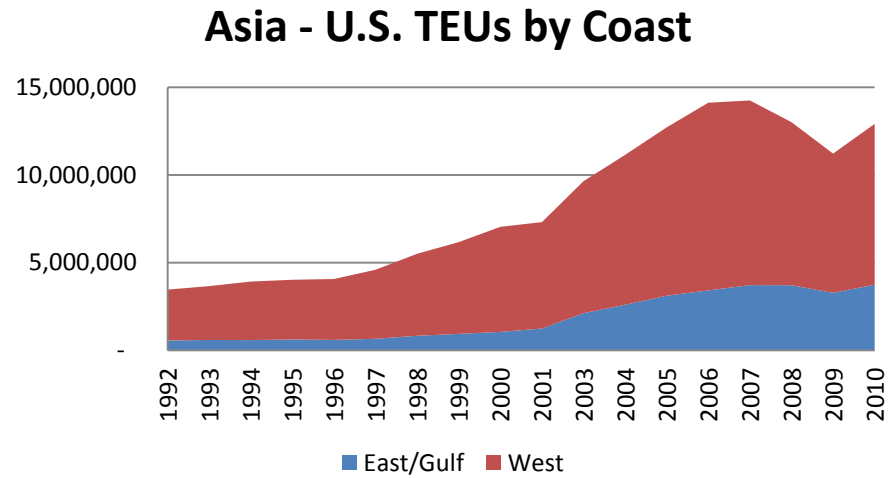
General Container Business Trends:



POS Cargo Forecast



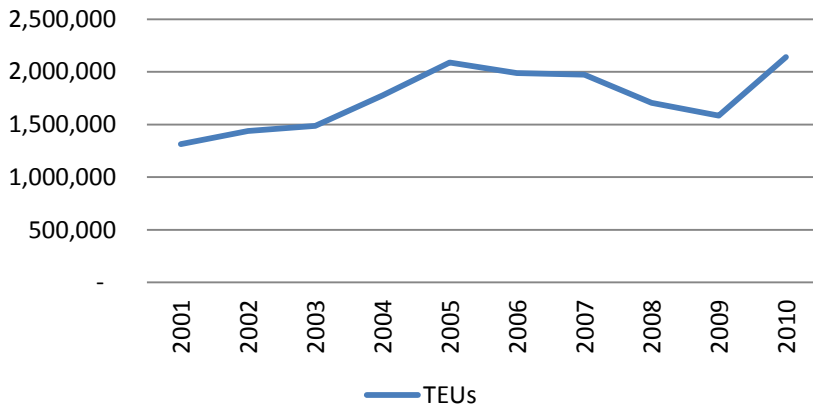
Data Source: PIERS



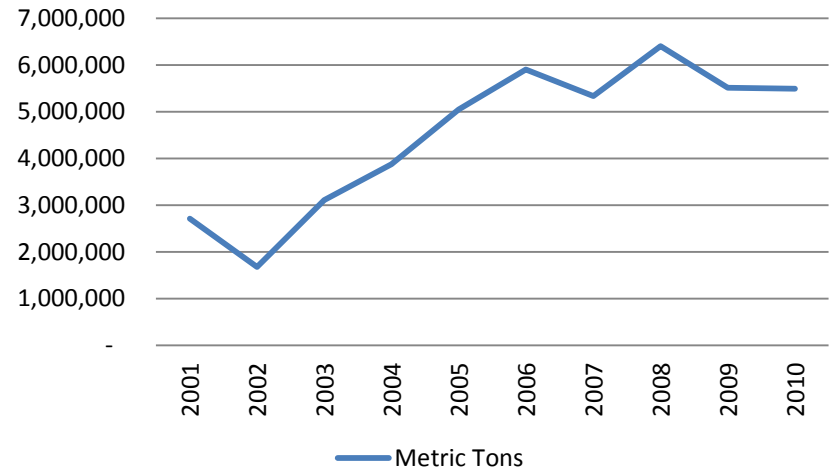
Data Source: PIERS

General Cargo Trends:

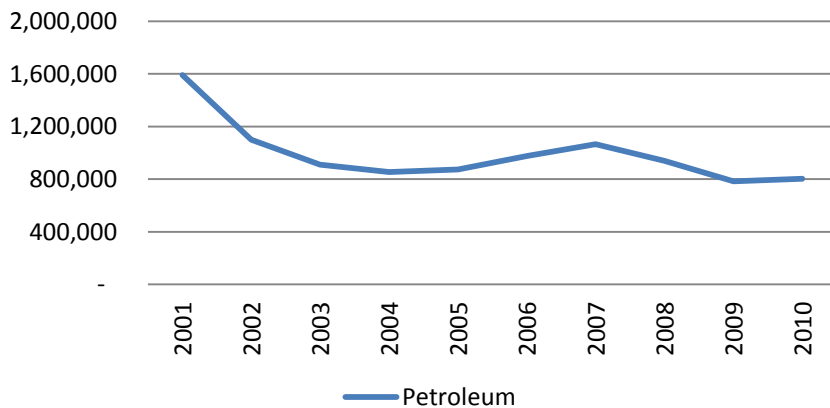
Ten-Year POS TEU History



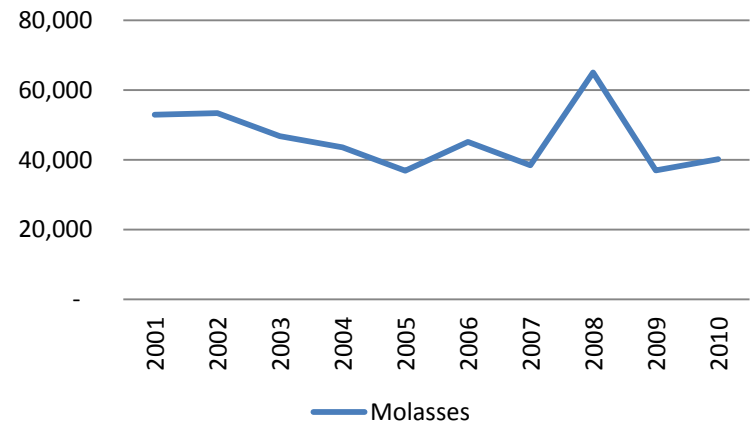
Ten-Year POS Grain History



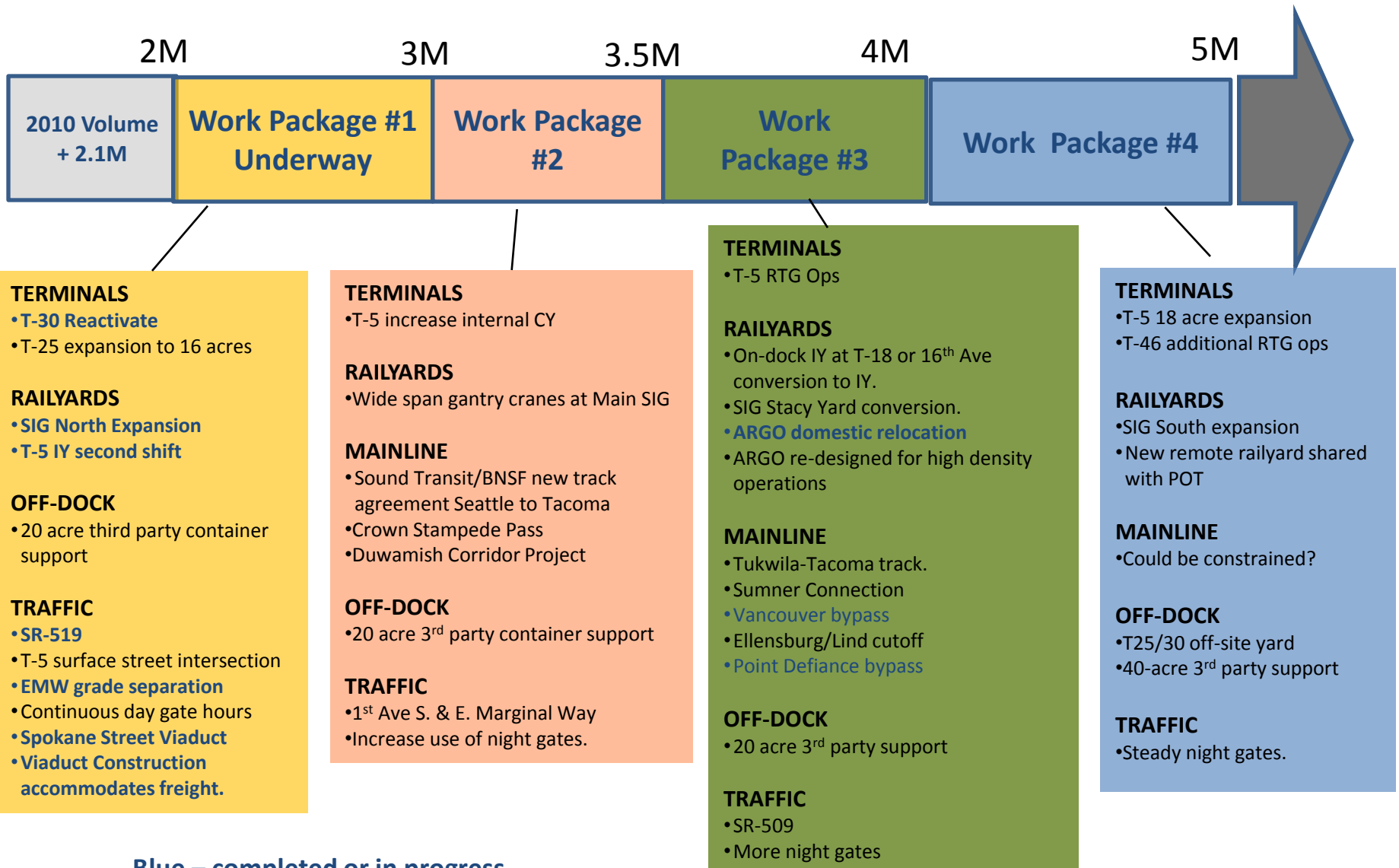
Ten-Year POS Petroleum History



Ten-Year POS Molasses History



Container Capacity Growth Plan



Top 2009 Washington State Agriculture Crops

Top 2010 Washington State Agriculture Exports by Volume via POS

Top 10 Commodity	2009 Value of Production (\$ In Millions)
Apples ¹	\$1,473
Milk	\$ 684
Wheat	\$ 597
Potatoes ²	\$ 646
Cattle/Calves	\$ 473
Hay	\$ 442
Nursery/Greenhouses	\$ 293
Cherries	\$ 224
Hops ¹	\$ 264
Grapes ²	\$ 210

Commodity Description	Metric Tons
Animal Feed,Hay,Brewer Grain	652,582
Vegetables	514,877
Fruit	184,532
Foodstuffs, Pastes, Sauces, Soups	100,527
Meat	91,822
Milk, Eggs, Dairy Products	91,797
Soybean; Corn Soya Milk, Isolates	77,449
Bulk Barley,Corn, Oat, Wheat, Sorghum	51,512
Onions, Shallots	46,103
Bread, Cereal, Grain, Malt, Flour	44,294

¹ First in U.S. production.

² Second in U.S. production.

Domestic Cargo Trends

Ten-Year POS Domestic TEU History

