Sustaining Seattle’s Working Waterfront
Port of Seattle and Northwest Seaport Alliance Governance

King County Voters

Port of Seattle Commission

Executive Director

Operational Divisions

Pierce County Voters

Port of Tacoma Commission

Northwest Seaport Alliance Formed in 2015

Port of Seattle Founded 1911
Maritime Gateway Components

Northwest Seaport Alliance (NWSA)

Maritime Industrial and Innovation

Homeport of the North Pacific Fishing Fleet

Largest Cruise Port on the U.S. West Coast
The Port Advances Public Priorities and Values

Maritime Industries, Transportation, Environment, Economic and Workforce Development are Top Priorities
Washington’s Maritime Economic Impact

The maritime industry paid nearly $4.5 billion in wages in 2015 with average salaries of $65,300. In comparison, the state’s average wage in 2015 was $56,700 (does not include benefits).

Industry-wide, revenues have grown 2.4% per year from 2012 to 2015, with the largest growth rate in Maritime Logistics & Shipping at 5.2%.
Working Waterfront Principles

• **Maritime and Industrial Uses**: Maximize deep-water facilities and industrial lands to serve maritime industrial uses

• **Connection**: Expand the connection to the waterfront for all

• **Finances**: Support financial sustainability of the Port/NWSA

• **Environment**: Deliver leading edge environmental stewardship practices and facilities

• **Transportation**: Facilitate improved the transportation mobility of people and goods in the region
Marine Cargo

- Directly supports approximately 20,100 jobs with an average wage of $95,000
- Larger vessels need the right infrastructure
- $340 million investment in T-5
## Marine Cargo Economic Impact

Comparable with other major Washington industry clusters

### Exhibit 23. Comparison of Total Economic Impacts between The NWSA and Other Industries and Industry Clusters in Washington State, Various Years

<table>
<thead>
<tr>
<th>Study Year</th>
<th>Aerospace</th>
<th>Agriculture &amp; Food Processing</th>
<th>Maritime Sector</th>
<th>NWSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>252,800</td>
<td>220,600</td>
<td>191,100</td>
<td>58,400</td>
</tr>
<tr>
<td>2013</td>
<td>93,800</td>
<td>128,900</td>
<td>69,500</td>
<td>20,100</td>
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<tr>
<td>2015</td>
<td>$68,641</td>
<td>$19,488</td>
<td>$17,142</td>
<td>$5,858</td>
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<tr>
<td>2017</td>
<td>2,70</td>
<td>1,71</td>
<td>2,75</td>
<td>2,91</td>
</tr>
<tr>
<td></td>
<td>3.68</td>
<td>11.32</td>
<td>11.15</td>
<td>9.97</td>
</tr>
</tbody>
</table>

### Exhibit 24. Comparison of Direct and Total State Fiscal Impacts between The NWSA and Other Industries and Industry Clusters in Washington State, Various Years

<table>
<thead>
<tr>
<th>Study Year</th>
<th>Aerospace</th>
<th>Agriculture &amp; Food Processing</th>
<th>Maritime Sector</th>
<th>NWSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$30.4</td>
<td>$342.1</td>
<td>$361.0</td>
<td>$135.9</td>
</tr>
<tr>
<td>2013</td>
<td>$86.4</td>
<td>$342.1</td>
<td>$361.0</td>
<td>$135.9</td>
</tr>
<tr>
<td>2015</td>
<td>$115.7</td>
<td>$342.1</td>
<td>$361.0</td>
<td>$135.9</td>
</tr>
<tr>
<td>2017</td>
<td>$33.3</td>
<td>$342.1</td>
<td>$361.0</td>
<td>$135.9</td>
</tr>
</tbody>
</table>

### Significant impact on statewide tax generation


<table>
<thead>
<tr>
<th></th>
<th>Direct</th>
<th>Secondary</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;O</td>
<td>$12.5</td>
<td>$26.8</td>
<td>$39.3</td>
</tr>
<tr>
<td>Sales &amp; Use Taxes</td>
<td>$17.6</td>
<td>$66.3</td>
<td>$83.9</td>
</tr>
<tr>
<td>Other</td>
<td>$3.2</td>
<td>$9.4</td>
<td>$12.6</td>
</tr>
<tr>
<td>Total</td>
<td>$33.3</td>
<td>$102.6</td>
<td>$135.9</td>
</tr>
</tbody>
</table>
Investing in Key Infrastructure
Summary

- Make it “Big Ship Ready”
- Larger cranes and provide deeper draft at berths, electrical upgrades and upland improvements
- Goal is to handle two 18,000-TEU vessels simultaneously
- Preserves and grows maritime jobs

Justification

- To remain competitive, the NWSA must have terminals capable of serving the largest ships calling the West Coast now and into the future.

Projected Cost - $340M    Target Phase 1 Completion – Q4 2020
Key Elements of Permit Conditions

Air Quality
- Implement Air Quality Management Plan
- Monitor PM 2.5 to confirm operations meet modeled assumptions < 6 tons/year

Noise
- Implement Operations Noise Management Plan
- All mobile cargo handling equipment uses broadband safety alarms
- Railroad Quiet zone

Traffic
- Implement Gate Queue Management Plan
- Avoid backups past intersection of SW Spokane St and access bridge
- Roadway and signalization improvements

Stormwater
- Treatment system design is informed by future use
- Tenant holds ISGP (Industrial Stormwater General Permit)
- Best management practices and benchmark sampling
# POS Waterfront 5-Year Capital Improvement Projects

<table>
<thead>
<tr>
<th>Project</th>
<th>Asset Stewardship</th>
<th>Financial Sustainability</th>
<th>Community &amp; Environment</th>
<th>Readiness to Proceed</th>
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</thead>
<tbody>
<tr>
<td>Fishermen's Terminal Gateway Building</td>
<td></td>
<td>x</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Bell Harbor Conference Center Modernization</td>
<td></td>
<td>x</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Fishermen's Terminal Docks 3, 4 &amp; 5 Fixed Pier</td>
<td>x</td>
<td></td>
<td></td>
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<tr>
<td>Salmon Bay Marina Docks D &amp; E Replacement</td>
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<td>4</td>
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<tr>
<td>Pier 66 HVAC Systems Upgrade</td>
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<td></td>
<td>4</td>
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<tr>
<td>Terminal 117 Restoration</td>
<td></td>
<td></td>
<td>x</td>
<td>3</td>
</tr>
<tr>
<td>Fishermen's Terminal Maritime Innovation Center</td>
<td></td>
<td></td>
<td>x</td>
<td>3</td>
</tr>
<tr>
<td>New Cruise Facility (Assumes 50% Tenant Cost Share)</td>
<td></td>
<td></td>
<td>x</td>
<td>2</td>
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<tr>
<td>Terminal 91 Uplands Development</td>
<td></td>
<td></td>
<td>x</td>
<td>2</td>
</tr>
<tr>
<td>Terminal 91 Berth 6 &amp; 8 Redevelopment</td>
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<td></td>
<td>x</td>
<td>2</td>
</tr>
<tr>
<td>Waterfront Electrification</td>
<td></td>
<td>x</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Harbor Mooring Dolphins</td>
<td></td>
<td></td>
<td>x</td>
<td>1</td>
</tr>
</tbody>
</table>

*Readiness to proceed: 4 = imminent  3 = needs permit/plan  2 = 1+ year out  1 = significant work needed*
The largest, fastest growing, most environmentally progressive cruise terminals on the west coast
Statewide commercial fishing and related industries produce $10 billion in business revenue.
Economic Development and Innovation

- Provide maritime affordable options
- Accelerate innovation through clusters
Washington Maritime Blue and Maritime Innovation Center

Create a **Strategy** for accelerating the BLUE economy, technology innovation and sustainability in Washington’s maritime industry.

Establish a **Maritime Innovation Center** for R&D and commercialization of innovation technology through public/private partnerships.
Connect with the Port of Seattle and Northwest Seaport Alliance

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- youtube.com/user/PortofSeattle