



greater seattle

GATEWAY TO THE PACIFIC

Port of Seattle image by Don Wilson

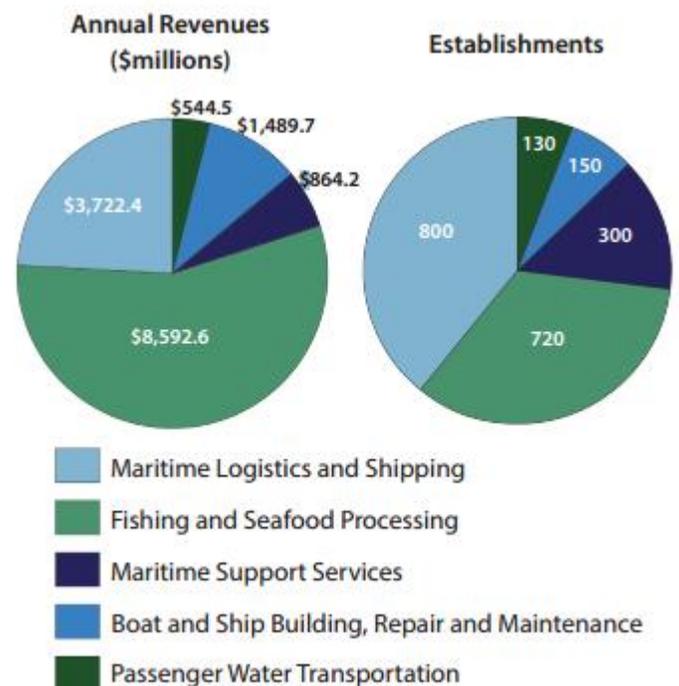
Greater Seattle and Washington State is home to a vibrant Maritime industry. The region has a rich history of waterborne trade, fishing, and ship building, which has allowed the industry to grow into the cornerstone of the state's economy that it is today. Together, the diverse elements that comprise this industry contribute \$15.2 billion in direct revenue to the state's GDP. Greater Seattle enjoys a geographical location that makes it a natural hub for global trade. It has the closest U.S. ports to Asia, and connects the continental United States to the bountiful land and waters of Alaska.

HOME TO THE 3RD LARGEST CONTAINER GATEWAY IN NORTH AMERICA

DIVERSE, YET INTERCONNECTED

The Washington Maritime industry is conventionally divided into five subsectors. These subsectors reflect the diversity and scope of the industry. They consist of: | **Maritime Logistics and Shipping** | **Fishing and Seafood Processing** | **Maritime Support Services** | **Boat and Ship Building, Repair and Maintenance** | **Passenger Water Transportation** | Although the industry has been an integral part of the state's economy for a long time and is fully established, it continues to grow at impressive rates.

With the increasing interconnectedness of the world, the industry is poised to reach never-before-seen heights. The booming trade and tourism relationship the region enjoys with Asia is particularly fruitful. Industries such as cargo shipping and seafood exports are experiencing the benefits of increased consumption. Likewise, the cruise line industry is enjoying rapid tourism growth.



Source: Washington State Maritime Sector Economic Impact Study, 2013

RECREATIONAL BOATING

Washington is home to a robust and active recreational boating community which contributed \$3.18 billion to the state's economy in 2013 (National Marine Manufacturers Association, 2013).

Recreational boating accounts for the largest portion of Washington's \$22.2 billion outdoor recreation economy. Nearly 240,000 recreational boats are registered in the state, and it is home to 1,427 boating businesses. (WA Maritime Federation).



EDUCATION & TRAINING

Greater Seattle is a leader in maritime education and training. Occupations within the Maritime sector generally require targeted on-job-training and/or certification and endorsements rather than traditional higher education.

The **Seattle Maritime Academy** is a prime example of maritime education and training in the region. It is conducted through Seattle Central CC, the program is fully accredited by the U.S. Coast Guard, and boasts an impressive 95% employment rate for its graduates.

The **NW Center of Excellence for Marine Manufacturing and Technology** is another leading educator of maritime professionals in Washington. The Center provides a well-rounded range of educational paths and achieves great success through close integration of industry and government representatives on its advisory board.

SUBSECTORS

- **Maritime Logistics and Shipping:** includes Port and harbor operations, deep and shallow water goods movement, inland water freight transport, and refrigerated warehousing and storage. Operating jointly under the banner of the Northwest Seaport Alliance, the closely linked Port of Seattle and Port of Tacoma are the 4th largest U.S. port by TEUs. Greater Seattle ports are the closest U.S. ports to Asia.

- **Fishing and Seafood Processing:** Washington State exports more fish than any other state in the country. This sector includes all activity related to the catching and processing of fish including finfish and shellfish, as well as aquaculture and recreational fishing. Washington State ranked third in the U.S. by catch volume in 2013.

- **Maritime Support Services:** includes providers of services and goods that are directly linked to the Maritime industry. Examples include providers of fuel, electronics, parts, safety and navigational systems, financial and legal services, naval architects, as well as federally funded support services. Also included are the marina operations themselves.

- **Boat and Ship Building, Repair and Maintenance:** includes new construction of commercial, recreation, and military vessels, as well as maintenance, refurbishment and overhaul, and modernization of vessels. Shipbuilding and repair has a long history in Washington State, capitalizing on its rich history in the timber industry.

- **Passenger Water Transportation:** Washington State is home to the largest passenger and vehicle ferry system in the United States, with 22 vessels carrying an annual average of 12 million passengers between 20 ports. This sector includes recreational cruise lines, Washington State Ferries and other ferries, water taxis, and recreational fishing, sailing, and diving charters. Global cruise companies whose ships call on the Port of Seattle include: Norwegian Cruise Line, Oceania Cruises, Carnival Line, Celebrity Cruises, Holland America Line, Princess Cruises, and Royal Caribbean.



NORTHWEST SEAPORT ALLIANCE

In 2015, the Ports of Seattle and Tacoma officially joined operations of the two ports' marine cargo terminals and related functions under the name of the Northwest Seaport Alliance. The partnership is a response to growing global competition and will position the region to better address challenges and create new economic opportunities.

It is the third largest container gateway for containerized cargo shipping, and connects Asia to major distribution points in the Midwest, Ohio Valley and the East Coast.

The Puget Sound is also a major gateway to Alaska. More than 80 percent of the total trade volume between Alaska and the lower 48 states moves through the Tacoma and Seattle harbors. Trade with Alaska was estimated at \$5.4 billion in 2015. If Alaska were ranked amongst Washington State's international trading partners, it would place fourth.

FUN FACTS AND ACHIEVEMENTS:

- The Port of Seattle is the #1 cruise ship homeport on the West Coast.
- The Washington Maritime industry averages a 6.4% annual growth rate.
- The Port of Everett provides valuable support to the aerospace industry, handling all of the oversized parts of the 747, 767, 777 and soon to be 777X airplane production lines.

WASHINGTON STATE MARITIME INDUSTRY ECONOMIC IMPACT

- \$15.2 billion in direct revenue | \$14.8 billion in additional revenue | \$30 billion combined annual impact to WA economy

- In 2014, the Seaport Alliance handled nearly 3.5 million TEUs of International and Domestic trade.

- Through June 2015, import volumes through the NW Seaport Alliance grew 3% compared to the same period on 2014.

Source: Washington State Maritime Sector Economic Impact Study, 2013, and Port of Seattle.



WASHINGTON MARITIME FEDERATION

- Founded in 2014 to create a unified voice for Maritime interests in Washington State.
- An "association of associations," comprised of maritime organizations and business organizations who have come together to support the industry.
- It is an "industry lead" organization that aims to build consensus and influence industrial and legislative change.

RESOURCES:

Washington Maritime Federation
<http://www.maritimefederation.com>

Department of Commerce
<http://www.commerce.wa.gov/Economic-Development/Industry-Sectors/Pages/Washington-State-Maritime.aspx>

Economic Development Council of Seattle and King County
<http://edc-seaking.org/maritime/>

Seattle Marine Business Coalition
<http://www.rhppublishing.com/smbc/home.php>

Northwest Marine Trade Association
<http://www.nmta.net/home.asp>

Seattle Propeller Club
<http://seattlepropellerclub.org/>

Northwest Center of Excellence for Marine Manufacturing and Technology
<http://www.marinecenterofexcellence.com/>

Seattle Maritime Academy
<http://seattlecentral.edu/maritime/>

SUSTAINABILITY

Washington State's maritime sector has cemented its place as a model for sustainability.

The Washington fishing industry has historically been lauded as a prime example of balancing commercial goals with environmental responsibility. The recently launched 21st Century Salmon and Steelhead Initiative seeks to ensure the continuing recovery of salmon and steelhead populations.

In 2015, The Ports of Seattle and Tacoma were two of seven U.S. ports which earned Inbound Logistics' Green Supply Chain Partner honors.

COMPANY SPOTLIGHTS

1. SSA MARINE

Seattle-based SSA Marine provides a full spectrum of services associated with marine terminal operations. They handle logistics related to the movement and storage of all types of cargo around the world. SSA facilities handle over 11 million TUEs annually.

Domestically, they have established operations in every major U.S. shipping region including the West Coast, East Coast, Gulf, and several river operations. Internationally, they have over 120 operations worldwide.

2. VIGOR INDUSTRIAL

With twelve locations and more than 2,500 workers Vigor is the leading provider of shipbuilding, ship repair and complex fabrication in the Pacific Northwest and Alaska. They build and repair fishing boats, tugs, ferries, barges, fireboats, high performance combatant crafts and a variety of aluminum workboats.

3. TRIDENT SEAFOODS

Trident Seafoods is the largest vertically integrated seafood company in the United States. Based in Seattle, Trident manages nearly 30 fishing and trawling vessels, and 20 onshore processing plants. They sell frozen, canned, smoked and ready-to-eat seafood products. The company was founded in 1973, and has over 6,500 employees (1,600 based in Washington).



TRADE DEVELOPMENT ALLIANCE of greater seattle

PROMOTE CONNECT EDUCATE