

Prepared for:



WASHINGTON MARINE CARGO FORECAST

2024

PORT PROFILES



Prepared by:



In association with:



MARCH 2025

INTRODUCTION

This Port Profiles report is supplemental to the Washington Marine Cargo Forecast, prepared for Washington Public Ports Association (WPPA) and the Washington State Freight Mobility Strategic Investment Board (FMSIB). The main report is available at: www.washingtonports.org/2025-marine-cargo-forecast

Each marine cargo port in Washington state is unique. Ports vary by geography, types of cargo, regions and hinterlands served, and infrastructure and capital improvement needs. The profiles in this addendum report detail these varied characteristics and help illustrate

the diversity of port activities across the state, including along the Columbia-Snake River System, Puget Sound, and the Pacific Coast. Information presented in each profile draws from public and port-specific data sources, port interviews, and public reports and documents.

Ports are presented in alphabetical order. The Northwest Seaport Alliance (NWSA), Port of Seattle, and Port of Tacoma are combined into one profile due to their unique relationship. Unless otherwise noted, all data, information, and photos in this document are attributable to each respective port.

MAP OF WASHINGTON STATE MARINE CARGO SEAPORTS AND RIVERPORTS

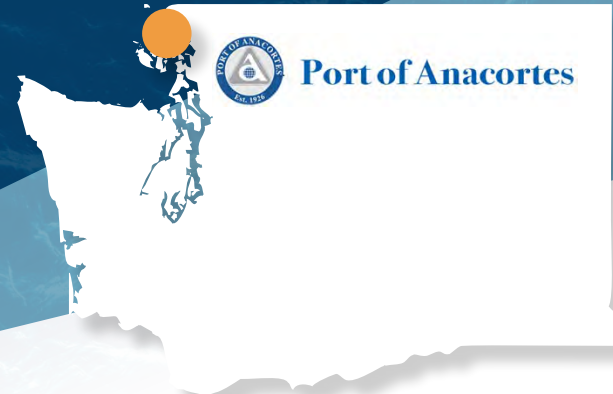


PORT OF ANACORTES

TYPE OF PORT: Seaport

LOCATION: Anacortes, Skagit County

WATERWAY: Guemes Channel



PORT ADMINISTRATION AND BUDGET

37

FULL-TIME STAFF

5

COMMISSIONERS

\$22M

2023 PORT REVENUES¹

PORT ACCESS

STATE ROUTE 20

MARINE CARGO FACILITIES

PIER 2 Primarily dry bulk exports. Ship loader, short-term moorage available, laydown space

CURTIS WHARF Moorage provided to workboats, small cruise ships, and other commercial maritime vessels; future cargo use planned

¹ Port of Anacortes 2024 Operating Budget and Capital Improvement Plan
<https://www.portofanacortes.com/governance/guiding-documents/>



MARINE CARGO OPERATIONS

Cargo Types

- Dry bulk
- Break bulk
- Project cargo

Commodities

- Petroleum coke
- Prilled sulfur
- Wood products

Tenants and Customers

- Shell U.S./Holly Frontier Sinclair
- ChemTrade
- Various project cargo customers

Major Markets

- Mexico
- India
- East & Southeast Asia

TRENDS

- Between 2014 and 2023, between 87% and 98% of the Port’s cargo was petcoke from Shell Oil’s Puget Sound Refinery in Anacortes and prilled sulfur from nearby Chemtrade. The remainder is attributable to project cargo.
- Cargo volumes have fluctuated significantly over the last decade, with total volume for 2023 about half of the peak volume in 2016.

PLANNED CARGO PROJECTS

- Retrofit Transit Shed on Pier 1 to support commercial maritime activity.
- Curtis Wharf commercial pump-out
- Curtis Wharf upland pavement rehab
- Pier 2 - Pond Wall Extension project to expand the Port’s stormwater detention and management.
- Terminal electrification
- Terminal upland development pads

Total Two-Way International Cargo Tonnage
Handled, 2014-2024 (metric tons)



Source: U.S. Census Bureau, USATrade.census.gov, 2024.

PORT OF BELLINGHAM

TYPE OF PORT: Seaport

LOCATION: Bellingham, Whatcom County

WATERWAY: Bellingham Bay



PORT ADMINISTRATION AND BUDGET

| | | |
|-----------------|---------------|-----------------------|
| 129 | 3 | \$28M |
| NUMBER OF STAFF | COMMISSIONERS | 2023 PORT REVENUES |

PORT ACCESS

I-5
M-5
BNSF (PLANNED FOR 2027)

MARINE CARGO FACILITIES

| | |
|--|--|
| BELLINGHAM SHIPPING TERMINAL | Two berths with 1,250 feet of length and 35 feet of depth |
| BERTH 1 - CENTRAL & NORTH PIERS | Heavy Lift Section at 1,200 PSF, 2 warehouses with 80,000 square feet of space |
| BERTH 2 - SOUTH PIER | 550 linear feet |
| BARGE DOCK | Stub pier with 15 feet of depth |

The Port is currently underway on a modernization project and plans to begin cargo operations in mid-2025. Plans include:

- **Bellingham Shipping Terminal Modernization Project: 2023-27**
- **Obtained grant funding for a rail spur to connect to BNSF**
- **Portable barge ramp being built, ready by 2026. Ability to load barge via crane currently.**
- **Upgrade cargo laydown/support area and terminal blacktop**
- **New Liebherr LHM420 Mobile Harbor Crane**
- **Planned commodities include containers, autos, barges, and aggregates.**

PORT OF BENTON

TYPE OF PORT: Riverport

LOCATION: Richland, Benton County

WATERWAY: Columbia River



PORT ADMINISTRATION AND BUDGET

23

NUMBER OF STAFF¹

3

COMMISSIONERS

\$7.7M

TOTAL OPERATING REVENUES²

PORT ACCESS

Southern Connection short line rail, Interstates 182 & 82, State Routes 240 & 224

MARINE CARGO FACILITIES

| | |
|---|---|
| BARGE TERMINAL FACILITY | 1 berth/100' slip; transload, multimodal (rail); industrial staging adjacent. Leased and controlled by the U.S. Navy. |
| CRANE SERVICES | Mobile crane services with operator |
| SOUTHERN CONNECTION RAIL | 16-mile short line rail network leased to short line operator Columbia Rail |
| RICHLAND BUSINESS PARK | Heavy industrial operations including fulfillment centers |
| NORTHWEST ADVANCED CLEAN ENERGY PARK | Newly acquired real estate aimed at supporting large industrial operations |

¹ Office of the Washington State Auditor. 2023. Accountability Audit report. Port of Benton. <https://portal.sao.wa.gov/ReportSearch/Home/ViewReportFile?arn=1033853&isFinding=false&sp=false>

² Port of Benton. 2024 Port of Benton Budget. <https://portofbenton.com/wp-content/uploads/2023/11/2024-Budget-Documents-Final.pdf>

MARINE CARGO OPERATIONS

Primary use

Offloading decommissioned nuclear materials for long term disposal

Cargo Types

- Breakbulk
- Bulk

Commodities

- Animal feed
- Frozen vegetables
- Project cargo
- Heavy industrial equipment

Major Markets

- Domestic
- Department of Defense



Tenants and Customers

- Tidewater
- Columbia Rail
- Lamb Weston
- Framatome
- BioGrow
- Atlas Agro
- Avalanche

TRENDS

Clean energy and industrial projects have significantly diversified cargo handled and tenant contracts at the Port.

PLANNED CARGO PROJECTS

- Barge Complex
 - Expand high dock footprint
 - Install shore power infrastructure
 - Increase laydown capacity
 - Implement security enhancements
- Rail Intermodal Facility Projects
 - An intermodal facility with a loop track, shuttle train service, yard, fencing, and essential infrastructure for streamlined cargo movement
 - Construction begins 2025/26
- North Port Rail Development – add a rail loop at the North Port property for bulk cargo export. Both Class I Rail Operators (UP and BNSF)
- Atlas Agro – green fertilizer production facility on rail and barge route

PORT OF CHEHALIS

TYPE OF PORT: Inland port

LOCATION: Chehalis, Lewis County



PORT ADMINISTRATION AND GOVERNANCE

4

NUMBER OF STAFF

3

COMMISSIONERS

\$1.1M

PORT REVENUES

MARINE CARGO-RELATED FACILITIES

Shoreline rail, connects to BNSF

| | |
|--------------------------------------|--------------------------|
| MAURIN RD INDUSTRIAL SITE 1 | 30-acre industrial land |
| MAURIN ROAD INDUSTRIAL SITE 2 | 7-acre industrial land |
| BISHOP ROAD INDUSTRIAL SITE 1 | 23-acre industrial land |
| CURTIS INDUSTRIAL SITE | 40-acre industrial land |
| RUSH ROAD INDUSTRIAL SITE | 34-acre industrial land |
| JACKSON HWY INDUSTRIAL SITE 1 | 5.5-acre industrial land |
| DAWSON ROAD | 9.5-acre industrial land |

PLANNED CARGO PROJECTS

- **CRG Development** - Short line extension to serve Port property across several parcels.
- **Long-term Industrial Rail Development** - Conceptual consideration for a track to run through most of the IDD and reconnect to create a loop.
- **Southwest Washington Grain Project** - Public grain storage and transloading facility.

PORT ACCESS

INTERSTATE: 5

STATE ROUTES: 6 & 12

MARINE CARGO-RELATED OPERATIONS

As an inland port, this port is comprised of industrial land and rail.

Rail Cargo Types

- **Bulk**

Rail Tenants and Customers

Agriculture commodity producers, wood and plastic manufacturers

Commodities

- **Plastics** • **Wood** • **Grain**

Major Markets

- **Domestic**

PORT OF CLARKSTON

TYPE OF PORT: River Port

LOCATION: Clarkston, Asotin County

WATERWAY: Snake River



PORT ADMINISTRATION AND BUDGET

6

NUMBER OF STAFF

3

COMMISSIONERS

\$1.6M

PORT REVENUES

PORT ACCESS

M-84

U.S. ROUTE 12, SR 128, SR 129

MARINE CARGO OPERATIONS

Cargo Types

• Bulk • Project Cargo

Commodities

• Grain • Forest products
• Renewable energy components

Major Markets

Domestic

MARINE CARGO FACILITIES

14TH STREET DOCK

408 ft. berth (14' depth below MOP) supported by 4.2 acres of upland space for laydown. Additional adjacent upland of 13 acres also available.

Moorage provided to workboats, cruise ships, and other commercial maritime vessels.

PLANNED CARGO PROJECTS

- 14th Street Dock – Condition Assessment & Rehabilitation Analysis (2025)
- Upgrade cargo laydown and paving
- Seeking grant funding to develop mixed use facilities for cargo and tourism



PORT OF EVERETT

TYPE OF PORT: Seaport

LOCATION: Everett, Snohomish County

WATERWAY: Port Gardner Bay
& East Waterway



PORT ADMINISTRATION AND BUDGET

110

NUMBER OF STAFF

3

COMMISSIONERS

\$46.7M

PORT REVENUES¹

PORT ACCESS

**BNSF Railway Mainline, Interstate 5,
U.S. Route 2, State Route 529,
Local oversize approved freight routes**

MARINE CARGO FACILITIES

PIER 1 (NORTH & SOUTH) 2 berths, support containerized, breakbulk, ro/ro and forest product cargoes. Rail access.

PIER 3 (NORTH & SOUTH) 2 berths, accommodates general, breakbulk and project cargoes, forest products and bulk cement handling.

PACIFIC TERMINAL WHARF 1 berth, primary container and breakbulk facility, 15 acres paved uplands. Rail access.

HEWITT TERMINAL WHARF 1 berth, primarily used for shipyard work, 36,000 sqft warehouse.

SOUTH TERMINAL WHARF 1 berth that supports container, Ro/Ro, breakbulk and project cargoes. Rail access.
22,000 square feet of transit shed.

NORTON TERMINAL WHARF Primarily a secure cargo storage facility with 40 acres laydown space and 396,000 sq. ft. warehouse for potential adaptive reuse.

MOUNT BAKER TERMINAL Satellite barge-to-rail facility supporting regional aerospace logistics.

MARINE CARGO OPERATIONS

Cargo Types

- Breakbulk
- Dry bulk
- Neo-bulk
- Container
- Ro/Ro

Commodities

Aggregates, project cargo, including construction, manufacturing, military, aerospace, energy, agriculture and forest products industries.

Major Markets

- Asian
- North America
- Europe
- Domestic

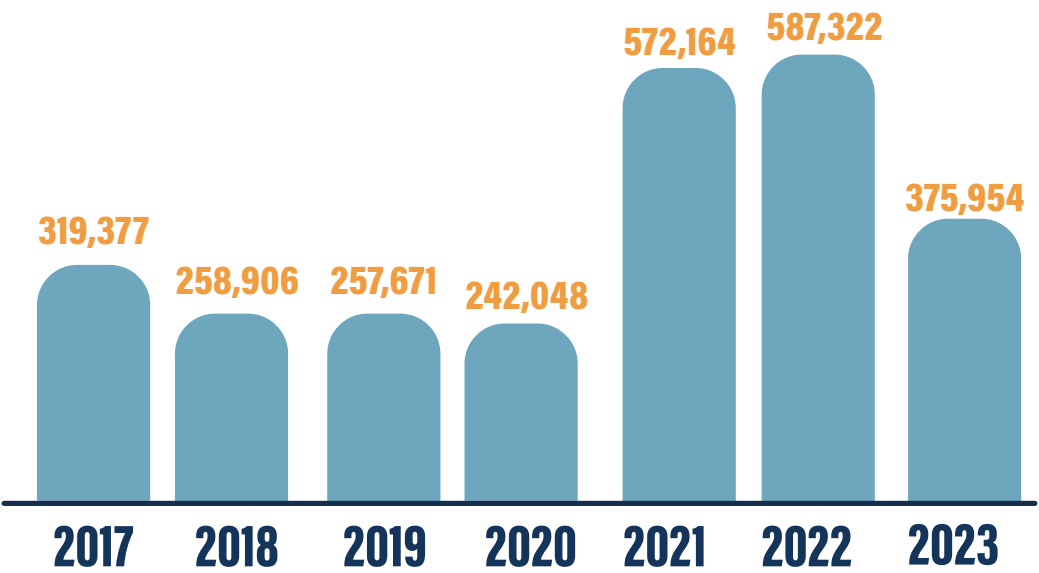
TRENDS

- Cargo volumes peaked in 2022 at nearly 600,000 short tons and 172 vessel calls.
- Imported containers peaked in 2022, at 60,713 TEUs.
- General cargo has averaged 133,246 short tons per year (inbound and outbound) over the last three years, 157% higher than the prior three years.

PLANNED CARGO PROJECTS

- Seaport maintenance, preservation, and modernization
- Pacific Terminal Improvements
 - Electrification of Pier 3
 - Reinforcement of Pier 3
 - EV Charging and Yard Trucks
 - Seaport Pile & Bulkhead Restoration
 - Stormwater Treatment
 - Paving

Total Two-Way Marine Cargo Tonnage Handled
(Domestic and International), 2017-2023, Short Tons



Source: Port of Everett, 2024.

PORT OF GRAYS HARBOR

TYPE OF PORT: Seaport

LOCATION: Grays Harbor, Grays Harbor County

WATERWAY: Grays Harbor



PORT ADMINISTRATION AND BUDGET

57

NUMBER
OF STAFF

3

COMMISSIONERS

\$42.65M

OPERATING REVENUES¹

PORT ACCESS

I-5

US HIGHWAY 101

US HIGHWAY 12

STATE ROUTE 105

MARINE CARGO FACILITIES

- TERMINAL 1** 1 berth, rail loop access, liquid bulk handling, uplands storage space
- TERMINAL 2** 1 berth, bulk loading facility, storage for 96,000 tons of product
- TERMINAL 3** 1 berth, access to BNSF & UP railroads via Puget Sound & Pacific Railroad (PSAP)
- TERMINAL 4** Twin deep water berths, access to BNSF & UP railroads via Puget Sound & Pacific Railroad (PSAP), warehouse space; Berth B being developed for ag exports; Berth A available for breakbulk, autos, oh/ow, etc.

¹ Office of the State of Washington Auditor. 2024. Financial Statements Audit Report. Port of Grays Harbor. <https://portal.sao.wa.gov/ReportSearch/Home/ViewReportFile?arn=1035850&isFinding=false&sp=false>

MARINE CARGO OPERATIONS

Cargo Types

- Bulk
- Breakbulk
- RoRo

Commodities

- Soymeal
- Seafood
- Wood products
- Liquid bulks
- Autos
- Oh/ow
- Military

Tenants and Customers

- Renewable Energy Group (REG)
 - BWC Terminals
- Ag Processing, Inc. (AGP)
- Pasha Automotive Services
 - Willis Enterprises

Major Markets

- Domestic
- Canada
- SE Asia
- South Korea

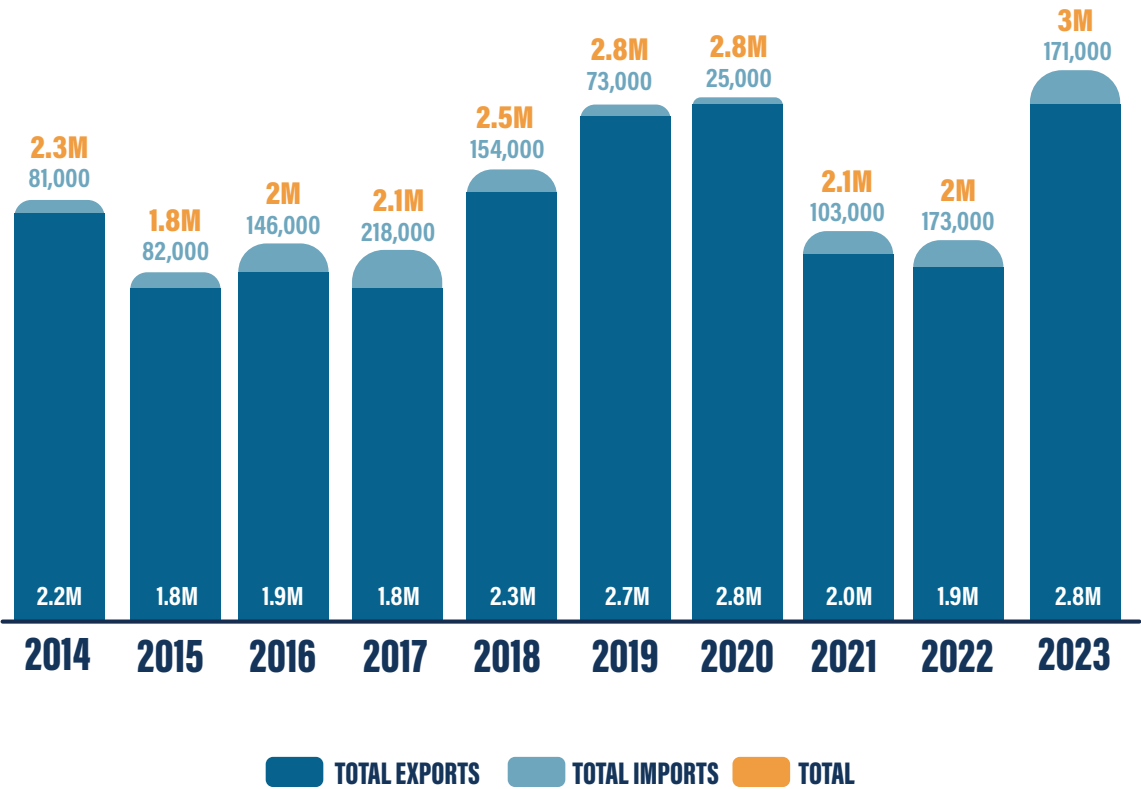
TRENDS

- Soymeal has been the largest commodity handled by volume since 2014, ranging from a low of 1.2 million metric tons in 2014 and a high of 2.7 million metric tons in 2023.
- Liquid bulks continue to see an increase at Terminal 1.
- Wood chips for west coast customers, logs for export, and automobiles imported have been key commodities handled since 2014.

PLANNED CARGO PROJECTS

Terminal 4 (T4) Expansion & Redevelopment Project – Will add additional rail for offloading, storage, and assembly; repurpose the 50-acre former SR 520 pontoon construction site into cargo laydown area; construct secured site access and roadway improvements; replace the marine terminal fendering system and provide Terminal 4 with stormwater collection and treatment facilities.

Total Two-Way International Cargo Metric Tonnage Handled, 2014-2023



Source: U.S. Census Bureau, USATrade.gov, 2024.

PORT OF KALAMA

TYPE OF PORT: River Port

LOCATION: Kalama, Cowlitz County

WATERWAY: Columbia River



Port
OF
KALAMA

PORT ADMINISTRATION AND BUDGET

21
NUMBER
OF STAFF

3
COMMISSIONERS

\$12.2M
2023 MARINE
TERMINAL REVENUES

\$21.6M
2023 TOTAL
REVENUES

PORT ACCESS

I-5

BNSF MAINLINE

COLUMBIA RIVER

MARINE CARGO FACILITIES

KALAMA RIVER INDUSTRIAL PARK One berth, grain export terminal

NORTH PORT One berth (break bulk)

CENTRAL PORT Two berths, rail access (logs and chemicals)

SOUTH PORT One berth, grain elevator



MARINE CARGO OPERATIONS

Cargo Types

- Liquid bulk
- Dry bulk
- Break bulk

Commodities

- Soybeans
- Corn
- Wheat
- Sorghum
- Steel
- Chemicals
- Logs

Tenants and Customers

- TEMCO
- Kalama Export Company
- Steelscape
- RSG Forest Products
- LANXESS

Major Markets

- Asia
- Domestic

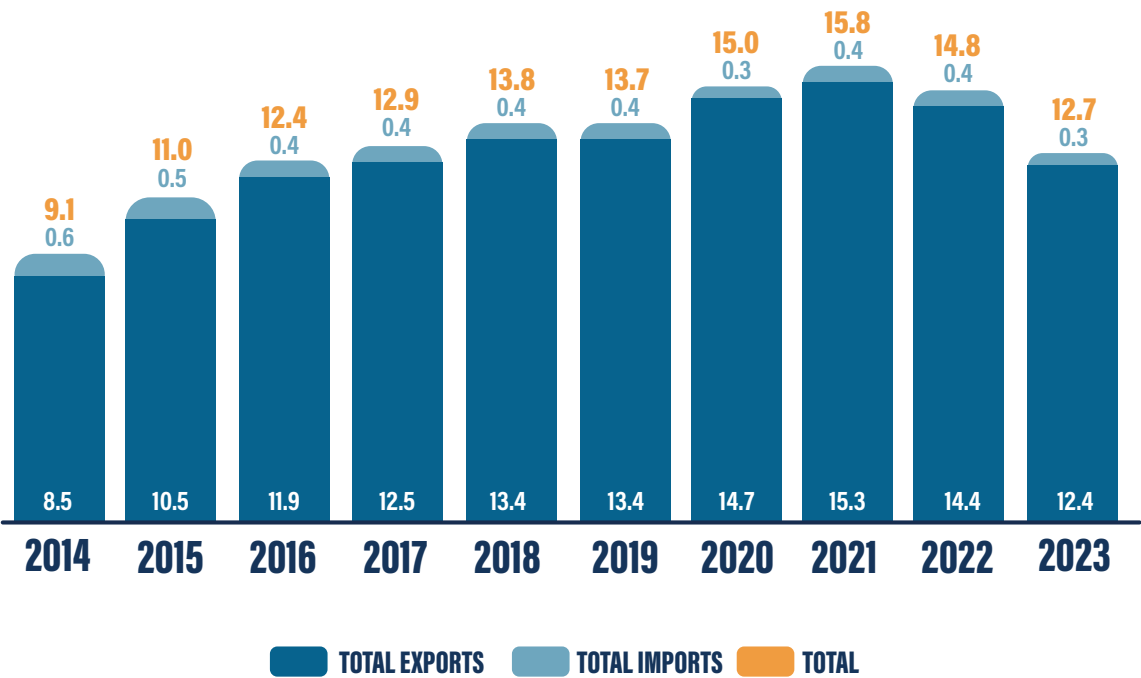
TRENDS

- Agricultural exports have grown 45% since 2014, from 8.5 million to 12.4 million tons.
- Exports peaked in 2021 at 15.3 million tons, an 80% increase from 2014.
- Imports include steel coils, logs, chemicals, and other industrial cargo.

PLANNED CARGO PROJECTS

- TEMCO Grain Terminal Rail Expansion Project
- Turning Basin for Large Vessels
- North Port Loop Rail Development

Total Two-Way International Cargo Tonnage Handled, 2014-2023 (millions of metric tons)



Source: U.S. Census Bureau, USATrade.census.gov, 2024.

PORT OF KLICKITAT

TYPE OF PORT: River Port

LOCATION: Dallesport, Klickitat County

WATERWAY: Columbia River



PORT ADMINISTRATION AND BUDGET

4

NUMBER OF STAFF¹

3

COMMISSIONERS

\$61,000

2024 PORT MARINE
CARGO REVENUES FROM
BARGE DOCK OPERATIONS

MARINE CARGO FACILITIES

TERMINAL 1 (WEST) One berth (154 foot barge dock face), staging area (0.73 acres), highway access. Facility is shared with Log Export Company.

PLANNED FACILITY: TERMINAL 2 (EAST) A second barge terminal facility is planned, not yet constructed.

Planned Cargo Projects

- Make way for handling rock from Port owned quarry and nearby quarries.
- Construct 2nd Barge Dock to the east.
- Rail spur access.

PORT ACCESS

**INTERSTATE 84, STATE ROUTE 14,
STATE ROUTE 197**

Major Markets • Domestic

Cargo Types • Neo-bulk

Commodities • Logs

Tenants and Customers

North Fork Resources – a Weyerhaeuser contractor and primary barge dock user and sole customer of logs handled

Trends

The Port of Klickitat has had a log yard tenant for decades. As the market for export logs changes, the demand for log barges increases or decreases.

¹ Office of the Washington State Auditor. 2022. Accountability Audit Report <https://portal.sao.wa.gov/ReportSearchHomeViewReportFile?arn=1031314&isFinding=false&sp=falseVFile?arn=1031314&isFinding=false&sp=false>

PORT OF LONGVIEW

TYPE OF PORT: River Port with 43' Draft

LOCATION: Longview, Cowlitz County

WATERWAY: Columbia River



PORT ADMINISTRATION AND BUDGET

42

ACTIVE COVERED
STAFF MEMBERS¹

3

COMMISSIONERS

\$57.2M

MARINE TERMINAL
OPERATING REVENUES²

PORT ACCESS

Class 1 Railroads: BNSF & UP;
Freeway Access: I-5 Marine
Highway M-84

MARINE CARGO FACILITIES

BRIDGEVIEW TERMINAL

Two berths, handles dry bulk, rail access

BERTH 4

One berth, Potential redevelopment site. 40 acres

BERTH 5

One berth, dry bulk (petcoke export facility) Rail Access, Storage Silos

BERTH 6

One berth, handles breakbulk, rail access, 100K Sq. Ft. Transit Shed

BERTH 7

One berth, handles breakbulk & dry bulk, hopper to rail, scrap metal export

RO-RO BARGE DOCK

One berth, handles breakbulk

BERTH 8

One berth, handles breakbulk

BERTH 9

One berth, handles dry bulk, rail access

Source: BNSF

¹ Office of the Washington State Auditor. 2024. Financial Statements Audit Report CY2023. <https://portal.sao.wa.gov/ReportSearch/Home/ViewReportFile?arn=1036308&isFinding=false&sp=false>

² Ibid

MARINE CARGO OPERATIONS

Cargo Types

- Bulk
- Breakbulk
- RO-RO
- Heavy lift
- Project cargo

Commodities

- | | | |
|----------------------------|----------------|--------------------|
| • Bentonite Clay | • Soda Ash | • Corn |
| • Distiller's Dried Grains | • Soya Meal | • Soybeans, |
| • Iron Oxide Fines | • Talc | • Crushed Soybeans |
| • Oats | • Wind | • Wheat |
| • Petroleum Coke | • Transformers | |
| • Potash | • Modules | |
| • Salt | • Steel | |
| | • Wood Pellets | |

Tenants and Customers

International Raw Materials (IRM), BP, Export grain Terminal (EGT), Bulk Cargoes, Blue Water Shipping Co., Pan Ocean Shipping, and various shippers managing bulk and project cargo operations at the Port.

Major Markets

- China
- Japan
- South Korea
- Philippines
- Australia

Port Owned Equipment

Shore Cranes, Super Gloria Reach Stackers, Man Lifts, Locomotives, Hustlers, Log Stackers, Forklifts, Lay Down Yard - 40 Acres FTZ - 30 Acres Warehousing - 300,000 Sq. Ft.

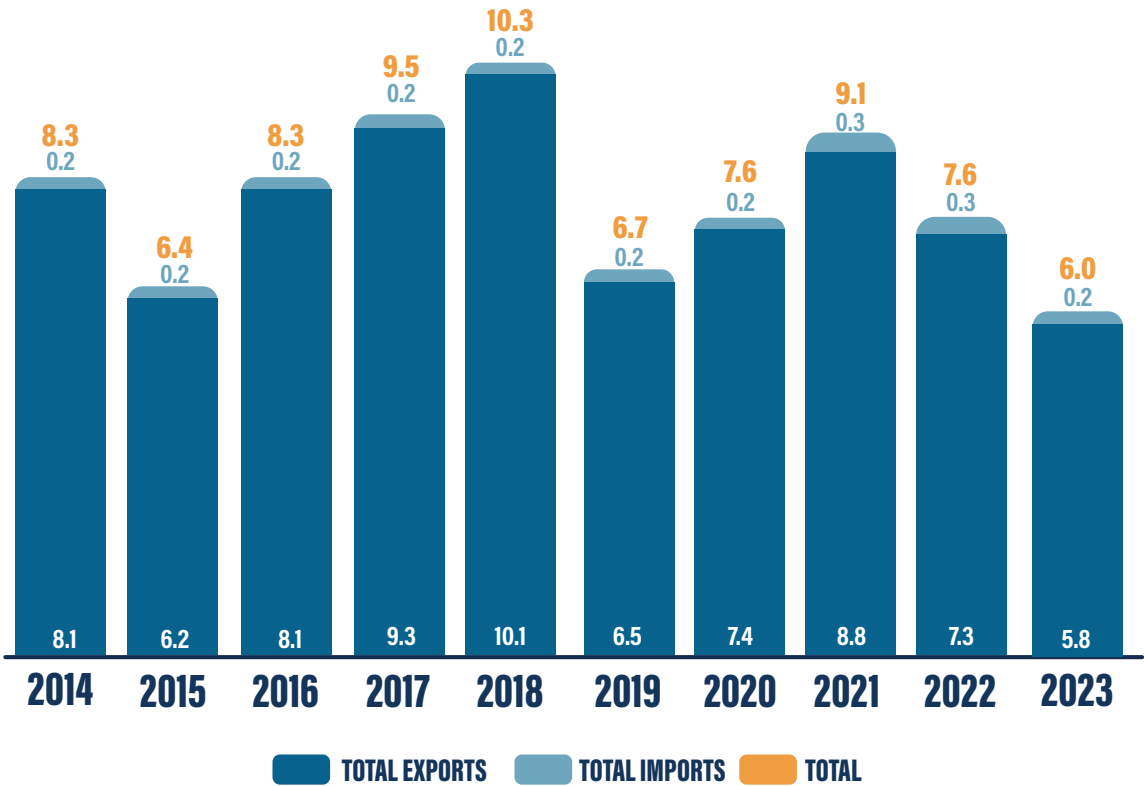
TRENDS

- The decline in exports in 2023 was a result of global grain market changes.
- 2023 soda ash and petcoke (calcined coke) exports increased.
- Petcoke handled at Berth 5 was up 6% from the ten-year average.

PLANNED CARGO PROJECTS

- Industrial Rail Corridor Expansion (IRCE)
- Berth 4 Redevelopment for Bulk Export Terminal
- International Way Grade Separation
- Expansion of EGT Grain Elevator

Total Two-Way International Cargo Tonnage Handled, Millions of Tons, 2014-2023



Source: Port of Longview

THE NORTHWEST SEAPORT ALLIANCE PORT OF SEATTLE • PORT OF TACOMA

This report groups The Northwest Seaport Alliance (NWSA), Port of Seattle, and Port of Tacoma together due to their unique relationship. In 2015, the ports of Seattle and Tacoma formed a marine cargo operating partnership called The Northwest Seaport Alliance. The NWSA manages the container, breakbulk, auto, and some bulk terminals in Seattle and Tacoma. The homeports of Seattle and Tacoma each operate a grain terminal and have their own business portfolios, excluding marine cargo facilities managed by the NWSA.

| | PORT OF SEATTLE | PORT OF TACOMA |
|--------------|----------------------------|-----------------------|
| TYPE OF PORT | Seaport | Seaport |
| LOCATION | Seattle, King Co. | Tacoma, Pierce Co. |
| WATERWAYS | Elliott Bay/Duwamish River | Commencement Bay |
| RAIL ACCESS | BNSF, UP | BNSF, UP, Tacoma Rail |

PORT ADMINISTRATION AND GOVERNANCE

STAFFING: The NWSA employs 60 workers. The Port of Seattle Maritime Division employs 322 workers. Many additional Port of Seattle employees (marine maintenance, finance, project management, environmental, external relations) are involved in marine cargo related activities, either for the Port of Seattle or NWSA. The Port of Tacoma employs 232 workers, of which a large share are directly engaged in marine cargo.

NUMBER OF COMMISSIONERS: 5 (Port of Seattle); 5 (Port of Tacoma); these two commissions together serve as Managing Members governing the NWSA.

MARINE CARGO OPERATING BUDGETS: \$1.0 billion (NWSA), \$5.8 million (Port of Seattle Terminal 86), \$44.2 million (Port of Tacoma).

PORT ACCESS

I-5

I-90

SR 509

SR 519

SR 705

SR 99

SR 167

SR 18

Duwamish Waterway

East Waterway

West Waterway

Hylebos Waterway

Blair Waterway

Sitcum Waterway

BNSF railroad

UP railroad

MARINE CARGO FACILITIES

NWSA

| | |
|-------------------------------|---|
| SEATTLE (NORTH HARBOR) | 6 cranes (6 Super Post-Panamax), 1,450-foot berth (and 2,900 at full buildout), 185 acres, 1,500 reefer plugs (coming soon). Intermodal yard with 3,800 feet of on-dock rail. |
| TERMINAL 5 | |
| TERMINAL 18 | 10 cranes (7 Super Post-Panamax and 3 Post-Panamax), 4,460 feet of berth, 196 acres, 1,250 reefer plugs. Intermodal yard with 7,600 feet of on-dock rail. |
| TERMINAL 30 | 6 cranes (3 Super Post-Panamax and 3 Panamax), 2,685 feet of berth, 82 acres, 535 reefer plugs. Near-dock rail. |
| TERMINAL 46 | 87-acre terminal capable of handling autos (Roll-roll-off), breakbulk, bulk, and containers. Near-dock rail. |
| TERMINAL 115 | 1,600 feet of berth, 96 acres, supporting domestic cargo (Alaska and Hawaii capable of handling breakbulk, project cargo, and containers). |
| TACOMA (SOUTH HARBOR) | |
| PIERCE COUNTY TERMINAL | 7 cranes (Post Panamax), 2,087 feet of berth, 189 acres, 654 reefer plugs. 23,544 feet of on-dock rail. |
| HUSKY TERMINAL | 8 cranes (Super Post-Panamax), 2,960 feet of berth, 118 acres, 600 reefer plugs. 22,793 feet of on-dock rail. |
| EAST SITCUM TERMINAL | 4 cranes (3 Post-Panamax and 1 Panamax) 900 feet of berth, 36 acres, and 300 reefer. 22,793 feet of on-dock rail at NIM. |
| WEST SITCUM TERMINAL | 8 cranes (4 Post-Panamax and 4 Panamax), 2,200 feet of berth, 108 acres, 875 reefer plugs. Near dock rail. |

NWSA (CONT'D)

| | |
|--------------------------------------|--|
| WASHINGTON UNITED TERMINALS | 6 cranes (2 Super Post-Panamax and 4 Post Panamax), 2,600 feet of berth, 142 acres, and 884 reefer plugs). 16,864 feet of on-dock rail. |
| EAST BLAIR ONE | 19-acre facility with 1,200 feet of berth handling autos, breakbulk. On-dock rail spur. |
| BLAIR TERMINAL | 15-acre facility with 600 feet of berth handling autos. |
| TOTE MARITIME ALASKA TERMINAL | 48-acre, 140 reefer plugs. Roll on/roll off operation domestic terminal. |
| WEST HYLEBOS TERMINAL | 24-acre facility with 1,030 feet of berth. Near dock rail. |
| TERMINAL 7 | 20-acre facility with 1,800 square feet of berth handling autos and breakbulk. On-dock rail at NIM. |
| MARSHALL AVENUE AUTO FACILITY | 146-acre facility handling autos. Near-dock rail. |
| TAYLOR WAY AUTO FACILITY | 90-acre facility handling autos. Near dock rail. |
| PORT OF SEATTLE | |
| TERMINAL 86 | One berth at a fully automated grain terminal, rail access |
| TERMINAL 91 | 8,000 feet of moorage, seafood product and processing, cold storage, rail access, warehousing, light industrial manufacturing, bunker fuel can be delivered by barge |
| PORT OF TACOMA | |
| TACOMA GRAIN TERMINAL | Grain exports |

MARINE CARGO OPERATIONS

Cargo Types

- Bulk
- Breakbulk
- Containers
- Ro-Ro
- Neo-bulk/project cargo
- Liquid bulk

Top Commodities

- Grain
- Seafood
- Autos
- Furniture
- Machinery
- Apparel
- Hay
- Frozen potato products
- Toys

Trends

- Total tonnage handled at the combined two ports rebounded in 2024 to 30.4 billion metric tons, up from a recent low of 25.2 billion metric tons in 2023.
- Non-containerized tonnage through the NWSA increased 22% in 2023 then 2% in 2024; the 2024 total was 58% above 2021 levels.
- Containerized trade, measured in TEUs, totaled 3.3 million TEUs in 2024, below the recent peak of 3.7 million in 2021. Much of this decline is attributable to a decline in imports from China.

Terminal Tenants and Customers

Port of Seattle:

- Louis Dreyfus Company (T-86 grain terminal)
- T-91 - Lineage, American Seafoods (ASC), Glacier Fish (GFC), Independent Packers (IPC), and FISC

Port of Tacoma:

- Tacoma Export Marketing Company (TEMCO)
- Auto Warehousing Co.
- Wallenius Wilhelmsen Solutions
- Trident Seafoods

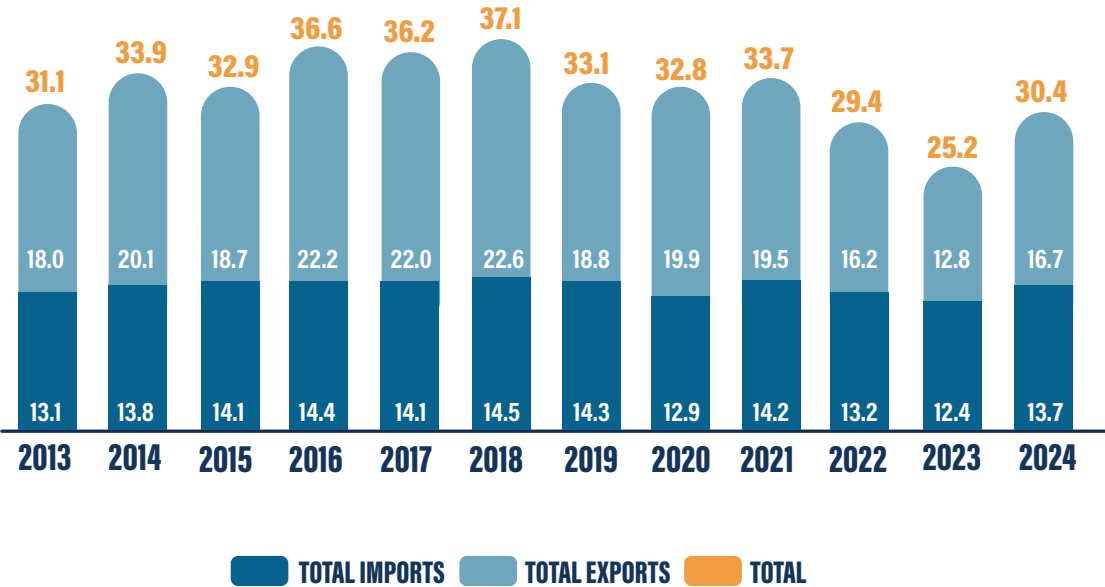
NWSA:

- SSA Marine
- Alaska Marine Lines
- Husky Terminal & Stevedoring
- Everport Terminal Services
- Washington United Terminals
- Ray-Mont Logistics
- TOTE Maritime Alaska
- Matson

Major Markets

- China
- Japan
- Vietnam
- South Korea
- Taiwan
- Thailand
- Indonesia
- Malaysia
- India
- Philippines

Total Two-Way International Cargo Tonnage,
NWSA/Port of Seattle/Port of Tacoma, 2013-2024
(Billions of Metric Tons)

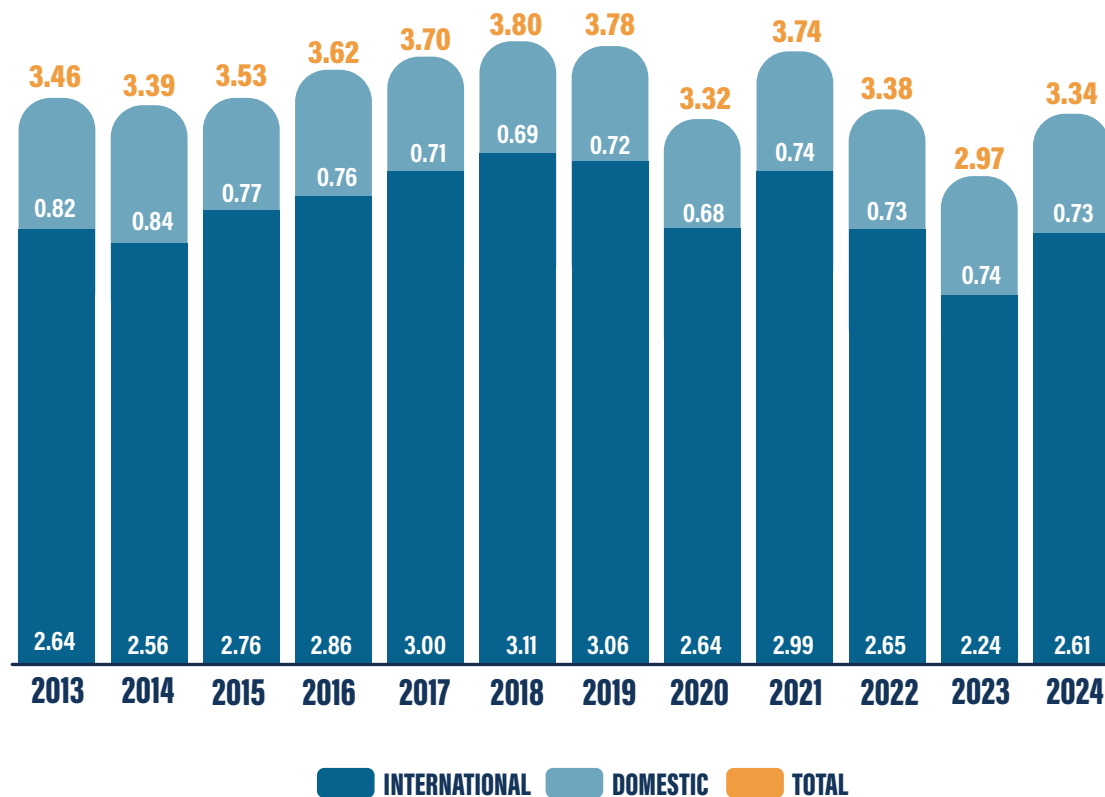


Source: U.S. Census Bureau, 2025. Note: This includes all tonnage in the USACE defined Port districts of Seattle and Tacoma, which may include some international cargo at non-Port facilities.



Trends (cont'd)

Total Containerized Trade through the NWSA,
Loaded and Empty Containers, 2013-2024 (Millions TEUs)



Note: Numbers may not sum to totals due to rounding.

Source: U.S. Census Bureau, USATrade.gov, 2025.



PLANNED CARGO PROJECTS

SEATTLE (NORTH) HARBOR

- NWSA completion of modernization and other improvements at Terminal 5
- NWSA Terminal 18 design of shore power installation and wharf rehabilitation

TACOMA (SOUTH) HARBOR

- NWSA modernization at Terminal 7D in the South Harbor
- NWSA Husky terminal expansion
- NWSA design of shore power systems at Pierce County Terminal and Washington United Terminal
- NWSA rebuild of Wapato Creek culvert at Pierce County Terminal
- Replace wooden light poles at several terminals
- Increase rail handling capacity for 53-foot containers, improve truck access, and reduce turnaround times at the port

PORT OF SEATTLE

- Develop cold storage facilities at T91 to support increased demand for refrigerated exports
- West Waterway Deepening: USACE for the West Waterway Channel Deepening Project

PORT OF TACOMA

- Blair Waterway Deepening: USACE Middle Blair Channel Dredging Construction, USACE Blair Channel Dredging Design, USACE Husky Channel Dredging Construction, USACE WUT Channel Dredging Construction
- Off-Dock Container Support Facility at Thorne Road development

NWSA-WIDE

- Clean air and stormwater investments
- Puget Sound Gateway Program (WSDOT): Both the SR 509 Completion Project in King County and SR 167 Completion Project in Pierce County will be completed simultaneously in multiple stages of construction with work lasting through 2029

PORT OF OLYMPIA

TYPE OF PORT: Seaport

LOCATION: Olympia, Thurston County

WATERWAY: Puget Sound



PORT ADMINISTRATION AND GOVERNANCE

44
NUMBER OF STAFF¹
(2025 ACTIVE COVERED EMPLOYEES)

5
COMMISSIONERS

\$6.3M
PORT REVENUES²

PORT ACCESS

BNSF, UP, I-5

MARINE CARGO FACILITIES

MARINE TERMINAL 3 deepwater berths, rail access

¹ Office of the Washington State Auditor. 2024. Financial Statements Audit Report <https://portal.sao.wa.gov/ReportSearch/Home/ViewReportFile?arn=1033826&isFinding=false&sp=false>

² Port of Olympia. 2024 Adopted Budget and Capital Investment Plan https://portolympia.com/about-us/finance/budget-financial-reports/prior-year-budgets/#elf_l1_Lw

MARINE CARGO OPERATIONS

Cargo Types

- Bulk
- Breakbulk
- Project cargo
- RO-RO
- Heavy lift

Commodities

- Logs
- Paper pulp
- Livestock
- Machinery

Major Markets

- Japan
- China
- South Korea
- Vietnam
- Domestic

TRENDS

Exports of wood products to the Asia market were decreasing since 2016 then spiked to 733,000 metric tons in 2021. Most recently, wood exports dropped 36% in 2024 to 450,752 metric tons. The Port has a history of successfully handling livestock bound for the Asia market also handling paper pulp imports for local mills.

PLANNED CARGO PROJECTS³

Clear span 70k sqft Warehouse Next to existing one.

Ongoing:

- Berth 1 Repairs
- Maintenance Facility
- Marine Terminal Paving

Total Two-Way International Cargo Tonnage Handled, 2014-2023



Source: U.S. Census Bureau, USATrade.gov, 2024.

³ Port of Olympia. 2024 Adopted Budget and Capital Investment Plan https://portolympia.com/about-us/finance/budget-financial-reports/prior-year-budgets/#elf_l1_Lw

PORT OF PASCO

TYPE OF PORT: River Port; Inland Port

LOCATION: Pasco, Franklin County

WATERWAY: Columbia River



PORT ADMINISTRATION AND BUDGET

40

EMPLOYEES

3

COMMISSIONERS

\$92,400

IN MARINE TERMINAL
OPERATIONS

PORT ACCESS

Interstate 182, U.S. Routes 395 & 12, Rail - BNSF

MARINE CARGO FACILITIES

- | | |
|---|--|
| BIG PASCO INDUSTRIAL CENTER (BPIC) | 420-acre rail-served industrial site; includes Container/barge/bulk facility, on-dock rail |
| CONTAINER / BARGE TERMINAL | Over 14 acres of container storage available, with power supplied for reefer units. Approximately 840 feet of slip space, with rail and crane access (Note: The port does not operate or own a crane). |
| PASCO PROCESSING CENTER | Large scale food processing facility; Access to rail, barge, road, and air |
| REIMANN INDUSTRIAL CENTER (RIC) | 300-acre BNSF Certified Site; Darigold dairy processing facility on-site; Rail access estimated construction 2026 |



MARINE CARGO OPERATIONS

Cargo Types

- Dry bulk
- Container
- Large Scale Equipment

Commodities

- Wood chips
- Grains
- Frozen foods

Tenants and Customers

- PCA – Packaging Corporation
- Christensen Inc
- Lampson International
- Barnhart Crane & Rigging

Major Markets

- Domestic
- International

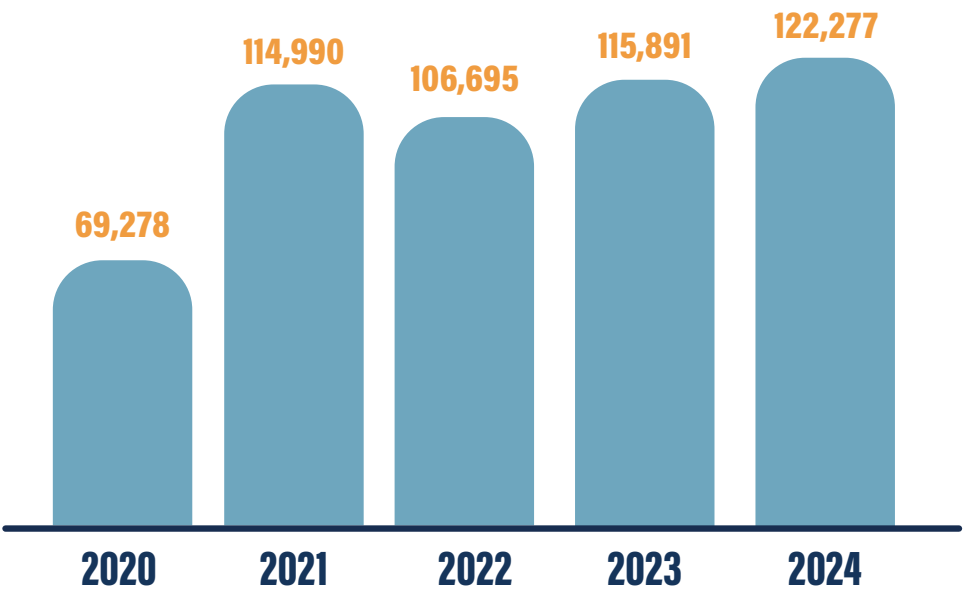
TRENDS

- Steady, incoming domestic cargo (woodchips) began in 2020.
- Large equipment also arrives via barge, gets transferred to truck, then trucked to Canada.

PLANNED CARGO PROJECTS

- Reimann Industrial Center (RIC) - clients in current negotiations for remaining plots
- Darigold Dairy Processing Facility at RIC, operations are estimated to begin in 3rd Qtr 2025. Products railed east
- Big Pasco Industrial Center - approximately 340 acres include 1.4M sf of warehousing space and 170K sf of smaller building space
- Osprey Pointe – 90 acres of waterfront, intended for future development
- Barge terminal improvements including dock upgrades, roads and utilities

Barge Terminal Inbound Tonnage 2020-2024



PORT OF PORT ANGELES

TYPE OF PORT: Seaport

LOCATION: Port Angeles, Clallam County

WATERWAY: Strait of Juan de Fuca



PORT ADMINISTRATION AND BUDGET

60
FULL AND
PART-TIME STAFF

3
COMMISSIONERS

\$10M
2023
PORT REVENUES¹

PORT ACCESS

MARINE HIGHWAY 5 (M-5)
US-101
STATE ROUTE 117

MARINE CARGO FACILITIES

| | |
|-------------------|--|
| TERMINAL 1 | 1,100ft terminal for lay berth and vessel repairs |
| TERMINAL 3 | 445ft terminal for cargo loading services (logs, chips, other forest products) |
| TERMINAL 4 | Leased to Arrow Marine Services |
| TERMINAL 5 | Unleased terminal |
| TERMINAL 6 | Unleased terminal |
| TERMINAL 7 | 500ft lay berth terminal |

**PORT INTERMODAL HANDLING
& TRANSFER FACILITY (IHTF)** Facility used for log storage, loading/unloading log barges, log dewatering,
and container loading

CARGO SURGE AREA Approximately 1.25 acres of cargo storage space, currently used for bulk storage

MARINE TERMINAL WAREHOUSE 17,000 sq. ft. warehouse with Port equipment storage areas, staff work areas, and
leased office/storage spaces

MARINE TRADES CENTER 18-acre waterfront property being developed with core infrastructure
(water, electricity, stormwater, sanitary sewer)



¹ Port of Port Angeles. 2024 Budget. <https://portofpa.com/wp-content/uploads/2023/11/2024-Budget-Port-of-Port-Angeles.pdf>

MARINE CARGO OPERATIONS

Cargo Types

- Dry bulk
- Break bulk
- Neo-bulk

Commodities

- The Port’s primary cargo is forest products, focusing on logs and wood chips. The Port handles an average of 61 million board feet of logs annually.²
- Domestic petroleum is mostly crude inbound.

Tenants and Customers

- Munro, LLC
- PA Hardwoods
- Interfor
- Sierra Pacific Industries
- Rayonier
- Merrill & Ring

Major Markets

- China
- Japan
- Domestic

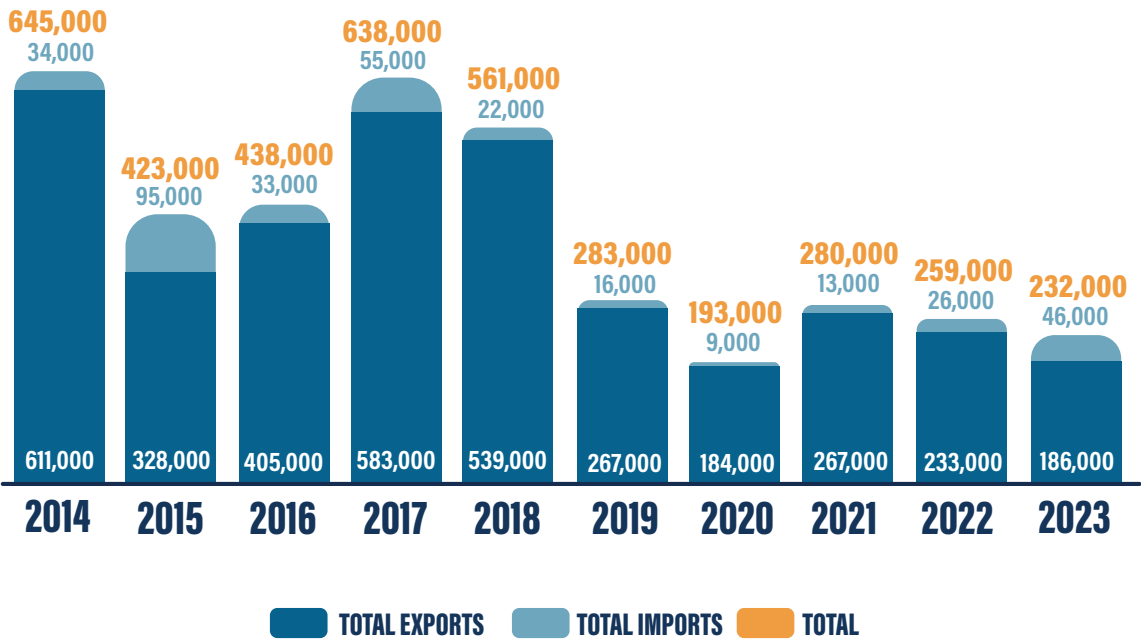
TRENDS

- Asia has averaged 90% of total international trade tonnage through the port over the last ten years.
- Log exports to Pacific Rim partners have decreased.
- New routes between the Port and Everett have led to an increase in domestic log trade.
- Wood chip and sawdust exports have expanded in recent years.

PLANNED CARGO PROJECTS

- Intermodal Handling & Transfer Facility enhancements
- Complete the Marine Trades Center
- Develop additional barge routes and expand activity along existing barge routes
- Expand cargo handling capabilities to include containers, additional bulk materials, etc.
- New Foreign Trade Zone approved January 2025.

Total Two-Way International Cargo Tonnage Handled, 2014-2023 (metric tons)



Source: U.S. Census Bureau, USATrade.census.gov, 2024.

² Port of Port Angeles
<https://portofpa.com/marine/intermodal-handling-transfer-facility/>

PORT OF VANCOUVER

TYPE OF PORT: River Port

LOCATION: Vancouver, Clark County, WA

WATERWAY: Columbia River



Port of Vancouver USA

PORT ADMINISTRATION AND BUDGET

54
NUMBER OF STAFF

3
COMMISSIONERS

\$35.6M
MARINE TERMINAL
OPERATING REVENUES

PORT ACCESS

ROAD: I-5, I-84

**RAIL: BNSF Railway, Union Pacific Railroad,
Canadian National Railroad and Canadian
Pacific Railroad**

MARINE CARGO FACILITIES

TERMINAL 2

GRAIN ELEVATOR

1 berth, 1 barge dock, Bulk terminal

BERTH 1: BREAK BULK

1 berth

BERTH 2: HEAVY LIFT & BULK EXPORT

1 berth, bulk scrap export dock

BERTH 3: HEAVY LIFT

1 berth, equipped with a Paceco multi-purpose crane and two Liebherr LHM mobile harbor cranes

BERTH 4: MULTIUSE

1 berth

BERTH 5: LIQUID BULK

1 berth, storage tank farms served by 3 pipelines connected to dock

BERTH 7: DRY BULK EXPORT

1 berth, heavy mineral bulk export dock, telescoping conveyor system, rail access, plans to convert to a soda ash terminal

TERMINAL 3

BERTHS 8 & 9: MULTIUSE

2 berths, can handle a wide array of cargoes including heavy lift and project, warehouse adjacent rail

TERMINAL 4

BERTH 10: AUTO, RO-RO

Subaru terminal - floating auto dock, cargo-staging area, auto-processing facility

BERTHS 13 & 14: LAYBERTHS

1,360 linear feet dock length, shore power, planned sewage, rail access

TERMINAL 5

BERTH 17: LAYBERTH & FUTURE EXPANSION

Bulk facility opportunity, four rails on a loop track with room to increase

MARINE CARGO OPERATIONS

Cargo Types

- Break bulk
- Project cargo
 - Ro-Ro
- Liquid & dry bulk

Commodities

- Automobiles
- Copper concentrate
- Agricultural products
- Wind energy components
- Wood pulp
- Steel & aluminum
- Scrap metal
- Jet fuel
- Diesel/Bio-Diesel
- Sodium Hydroxide
- Various Heavy Lift & Oversized Cargoes

Tenants and Customers

- United Grain Corporation (grain terminal)
- Vancouver Bulk Terminal (dry bulk facility)
- Subaru of America
- Marathon
- Sunoco
- Pacific Coast Shredding
- MARAD
- Tidewater Transportation & Terminals

Major Markets

- Asia
- Domestic

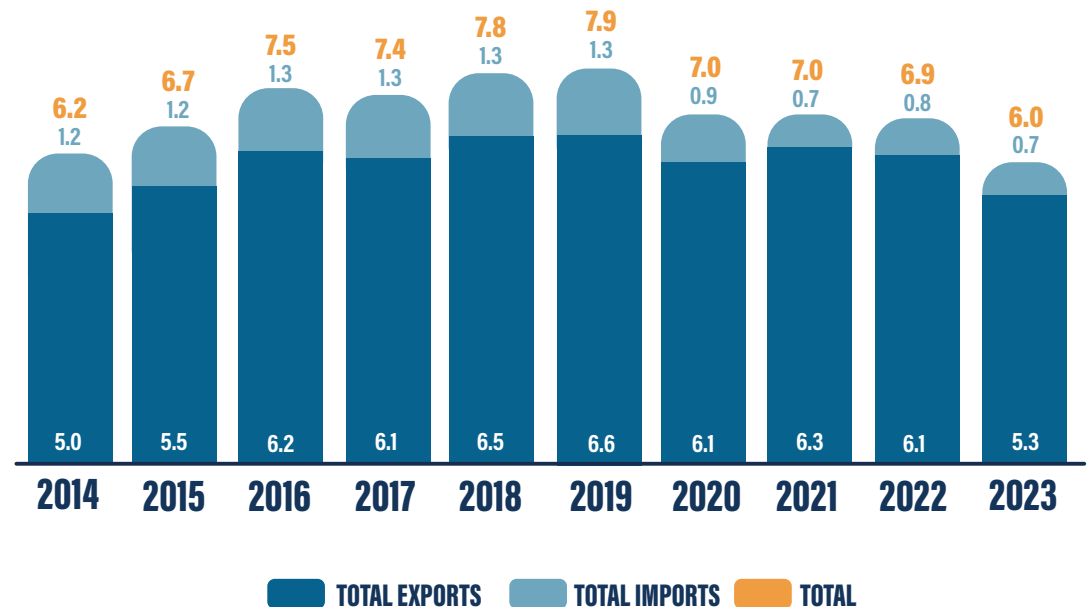
TRENDS

- The Port exported potash for the first time in 2023.
- Agricultural commodities, scrap metal, and mineral bulk exports accounted for almost 90% of total commodities handled by volume in 2023.
- Steel imports declined from over 800,000 metric tons in 2018, the year steel import tariffs were levied, to less than 200,000 metric tons in 2023.
- Wind turbine blades had a big year in 2022 followed by a relatively slow 2023, about 12,000 metric tons down to 5,000 (-60%). Blades have increased in size from 40 meters to 78 meters.
- Berth 7 has historically handled about 300,000 metric tons of copper concentrate and 150,000 metric tons of bentonite clay annually, there are plans to convert it to a soda ash terminal.
- Soda ash comes inbound from Wyoming's significant trona deposits.

PLANNED CARGO PROJECTS

- Terminal Rehabilitation and Improvements Plan: Working with Bulk Mineral Facilities Operator to redevelop Berth 7 and Terminal 2 & 3 to support existing and new commodities
- Terminal 5 development (early stages)

Total Two-Way International Cargo
Tonnage Handled, 2014-2023 (millions of metric tons)



Source: U.S. Census Bureau, [USATrade.census.gov](https://usatrade.census.gov), 2024.

PORT OF WALLA WALLA

TYPE OF PORT: River Port

LOCATION: Walla Walla, Walla Walla County

WATERWAY: Columbia and Snake Rivers



PORT ADMINISTRATION AND BUDGET

16
NUMBER OF STAFF

3
COMMISSIONERS

\$6.4M
2024 PORT REVENUES

PORT ACCESS

**U.S. ROUTE 12, SR 124, SR 125,
RAIL - UNION PACIFIC & BNSF
COLUMBIA AND SNAKE RIVERS**

MARINE CARGO FACILITIES

| | |
|--------------------------------|--|
| BURBANK INDUSTRIAL PARK | 111 acres, Grain storage complex, 2 barge slips, cargo dock, rail access |
| BURBANK HIGH DOCK | 60' x 250' cargo dock |



MARINE CARGO OPERATIONS

Cargo Types

- Liquid bulk
- Dry bulk
- Break bulk
- Neo-bulk
- Container

Commodities

- Grain
- Fuel
- Fertilizer
- Rock
- Project cargo
- Feed
- Wood chips

Tenants and Customers

- Packaging Corporation of America - owns a barge slip
- Northwest Grain Growers – leases grain train cars
- Tri-Cities Grain - leases space and barge slips in the Burbank Industrial Park

Major Markets

- Domestic
- Asia

TRENDS

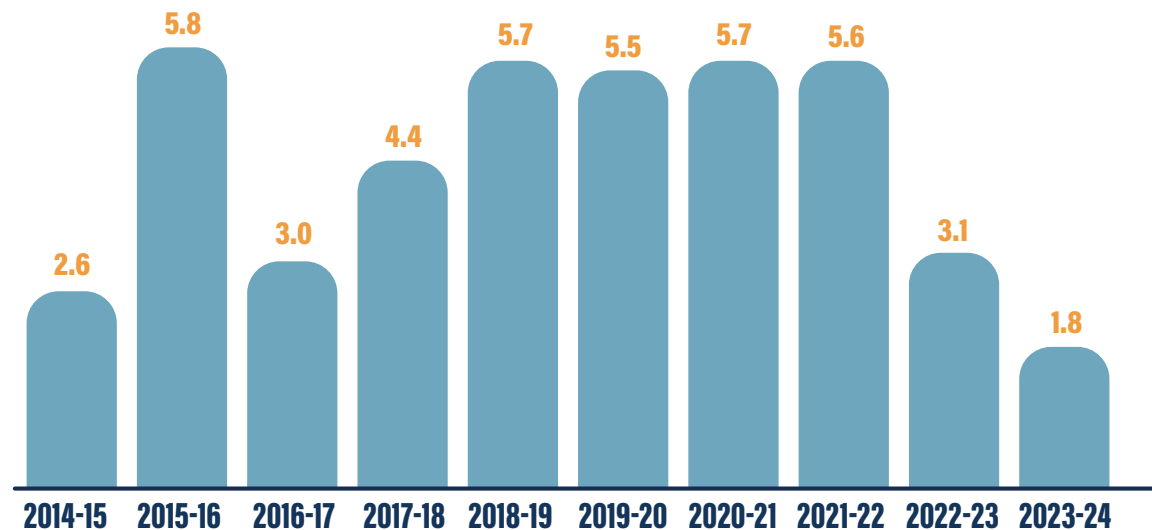
- Known for grain storage, liquid feed for livestock, and warehousing for wine businesses in the region.¹
- Bushels handled at Tri-Cities private terminals fell by two-thirds between 2021-22 and 2023-24.

PLANNED CARGO PROJECTS

- Industrial water system upgrades – adding 3 miles of distribution lines, totaling 17 miles.
- Shortline rail
- SkyNRG's Sustainable Aviation Fuel project
- ROCKWOOL Insulation facility
- US 12 Four-Laning Project (partner)
- Tri-Cities Intermodal Facility expansion

¹ American Journal of Transportation. 2020. <https://www.ajot.com/premium/ajot-inland-port-of-wallawalla-and-up-cold-connect-team-up-to-ship-precious-cargo>

Bushels Handled at Tri-Cities Private Terminals
(millions of bushels)



PORT OF WHITMAN COUNTY

TYPE OF PORT: River Port

LOCATION: Whitman County

WATERWAY: Snake River



PORT ADMINISTRATION AND BUDGET

8
NUMBER
OF STAFF

3
COMMISSIONERS

\$3.2M
PORT REVENUES¹

PORT ACCESS

**State Route 194, SR 193, SR 127,
Great Northwest Railroad Line,
Palouse River & Coulee City
Railroad, Camas Prairie Railroad
(port-owned rail spur)**

MARINE CARGO FACILITIES

The Port of Whitman County leases acreage at the Ports of Almota, Wilma, and Central Ferry to a diverse range of tenants, each responsible for operating and maintaining the infrastructure on their leased properties. These tenants play a vital role in supporting regional industries, ensuring the efficient use of port facilities, and contributing to the overall economic growth of the county.

PORT OF WILMA 8 docks, lay-down space, agricultural chemicals, wood products and grain transportation hub, grain facilities, grain handling facilities, wood products facility, fertilizer manufacturing facility, barge and rail access

PORT OF ALMOTA 2 docks, major grain-shipping terminal, grain handling facilities, barge access

PORT OF CENTRAL FERRY 3 docks, major grain terminal and fertilizer-manufacturing and -wholesaling site, grain handling facilities, fertilizer manufacturing facilities, barge and rail access

¹ Office of the Washington State Auditor. 2024. Financial Statements and Federal Single Audit Report. *Revenues from charges for goods and services

MARINE CARGO OPERATIONS

Cargo Types

- Bulk
- Neo-bulk

Commodities

- Grain
- Wood products
- Fertilizer

Major Markets

- Domestic

Tenants and Customers

- Bennett Lumber Products
- Columbia Grain International
- Almota Elevator Co.
- Pacific Northwest Farmer's Cooperative
- AGROW Solutions
- Central Ferry Fertilizer
- Helena Agri-Enterprises
- McGregor Company
- Motley-Motley
- Pomeroy Grain Growers
- Chad Lindgren-Riley's River Ranch
- Wilbur Ellis
- AAA Tree Service
- Ardent Mills
- CHS Primeland
- Clearwater Fiber
- Clearwater Propane
- Clearwater Tech
- Ferrellgas
- The O-Ring Store
- Heuett
- Knife River Construction
- LC Lawn and Landscape
- Leading Edge Aviation
- Quality Concrete
- Tidewater
- Urban Wood Recyclers

TRENDS

The Port serves as Whitman County's vital transportation hub, facilitating the movement of grain, fertilizers, and wood products to domestic and international markets. As a key gateway for one of the nation's top wheat-producing regions, it helps regional producers meet ever-changing global demand while enhancing supply chain efficiency. As trade, logistics, and infrastructure evolve, the Port of Whitman County remains critical in adapting to economic trends and ensuring long-term competitiveness for local industries.

PLANNED CARGO PROJECTS²

Port of Almota:

- WSDOT bridge repair project
- Port/tenant project to asphalt road

Port of Central Ferry:

- Road maintenance
- Infrastructure improvements — roads and dolphins
- Develop plan for remaining acreage
- Watershed Improvement

Port of Wilma:

- Improve and repair the dock and booms
- Develop quarry site from uplands area
- Dock bollard repair and re-position
- Development of remaining acreage

² Port of Whitman County. Comprehensive Scheme of Harbor Improvements 2021-2025. <https://portwhitman-web.s3-us-west-2.amazonaws.com/files/Comprehensive%20Scheme%20of%20Harbor%20Improvements.pdf>

PORT OF WOODLAND

TYPE OF PORT: River Port

LOCATION: Woodland, Cowlitz County

WATERWAY: Columbia River
(Marine Highway 84, M-84)



PORT ADMINISTRATION AND BUDGET

14

NUMBER OF STAFF

3

COMMISSIONERS

\$2.6m

TOTAL PORT REVENUES¹

PORT ACCESS

HIGHWAY: I-5, **RAIL:** BNSF, UP

MARINE CARGO OPERATIONS

There are currently no marine cargo operations, but planning is underway for a marine terminal. Two leases have been signed for marine cargo-related tenants.

Planned Cargo Types

**Bulk, Aggregate for sale or Asphalt/
concrete production on Martin
Bar properties**

Cargo Related Tenants

- **Wilsonville Concrete Products**
- **Granite Construction**

MARINE CARGO FACILITIES

The port owns over 400 acres, much of it underdeveloped waterfront property on the Columbia River.

AUSTIN POINT MARINE INDUSTRIAL AREA

Austin Point Dockside ~9acres

MARTIN BAR MARINE INDUSTRIAL AREA

Martin Bar North (~38 acres) – Leased to Granite Construction for an asphalt plant, a concrete plant and a barge terminal to offload aggregate.

Martin Bar South (~22 acres) – Leased to Wilsonville Concrete for a concrete plant, aggregate sales and a barge terminal to offload aggregate.

AUSTIN POINT RAIL INDUSTRIAL LOOP

200 acres

PLANNED CARGO PROJECTS

- **Austin Point Marine Terminal** – planning through 2031
- **Austin Point Development:** concept phase – advancement of existing rail to connect Austin Point to the BNSF mainline.
- **Martin Bar North (Wilsonville Concrete Products)** is currently in permitting and planning to be operating their barge terminal mid 2026.
- **Martin Bar South (Granite Construction)** is currently in permitting and planning to be operating the land operations mid 2026. Construction of their dock for their barge terminal is planned for 2028.

¹ Office of the State Auditor. 2024. Financial statements and Federal Single Audit Report. Port of Woodland. <https://portal.sao.wa.gov/ReportSearch/Home/ViewReportFile?arn=1035278&isFinding=false&sp=fals>



McKINLEY RESEARCH
GROUP, LLC

3800 Centerpoint Drive, Suite 1100 • Anchorage, AK 99503 • (907) 274-3200
9360 Glacier Highway, Suite 201 • Juneau, AK 99801 • (907) 586-6126

info@mckinleyresearch.com • mckinleyresearch.com