

Parsing the January 2019 Loaded TEU Numbers

Please note: The numbers here are not derived from forecasting algorithms but instead represent the actual TEU counts as reported by the North American seaports we survey each month. The U.S. ports we monitor collectively handle over 90% of the container movements at U.S. mainland ports. Unless otherwise stated, the numbers in this part of our analysis do not include empty containers.

Import Traffic

On the inbound side, container trade through U.S. West Coast ports slowed dramatically in January. While coastwide traffic did increase 4.9% (+44,825 TEUs) from January 2018, the number of inbound loaded boxes was down 9.7% (-103,662 TEUs) from the previous month, signaling an abrupt end to a late year import surge that was driven largely by fears of rising tariffs.

The slowdown was most evident at the Ports of Los Angeles and Long Beach, where January saw combined inbound loads nudge upward by just 0.8% (+6,273 TEUs) from a year earlier. However, a comparison of January's figures with December's at the two Southern California ports shows a combined 10.5% (-88,243 TEUs) fall-off. At the Port of Los Angeles, January imports edged up 1.7% (+7,091 TEUs) from a year earlier but were off 8.3% (-38,983 TEUs) from December. Next door at the Port of Long Beach, January imports were actually down 0.3% (-818 TEUs) year-over-year as well as down 13.2% (-49,260 TEUs) from December.

Exhibit 1	January 2019 - Inbound Loaded TEUs at Selected Ports					
	Jan 2019	Jan 2018	% Change	Jan 2019 YTD	Jan 2018 YTD	% Change
Los Angeles	429,923	422,832	1.7%	429,923	422,832	1.7%
Long Beach	323,838	324,656	-0.3%	323,838	324,656	-0.3%
San Pedro Bay Totals	753,761	747,488	0.8%	753,761	747,488	0.8%
Oakland	81,895	75,136	9.0%	81,895	75,136	9.0%
NWSA	128,615	96,822	32.8%	128,615	96,822	32.8%
USWC Totals	964,271	919,446	4.9%	964,271	919,446	4.9%
Boston						
NYNJ	327,345	309,003	5.9%	327,345	309,003	5.9%
Maryland	43,869	43,185	1.6%	43,869	43,185	1.6%
Virginia	109,757	104,150	5.4%	109,757	104,150	5.4%
South Carolina	88,107	78,169	12.7%	88,107	78,169	12.7%
Georgia	209,583	169,758	23.5%	209,583	169,758	23.5%
Jaxport	30,321	25,727	17.9%	30,321	25,727	17.9%
Port Everglades	27,730	30,978	-10.5%	27,730	30,978	-10.5%
Miami	39,286	34,439	14.1%	39,286	34,439	14.1%
USEC Totals	875,998	795,409	10.1%	875,998	795,409	10.1%
New Orleans	12,851	8,689	47.9%	12,851	8,689	47.9%
Houston	95,318	89,443	6.6%	95,318	89,443	6.6%
USGC Totals	108,169	98,132	10.2%	108,169	98,132	10.2%
Vancouver	170,370	138,977	22.6%	170,370	138,977	22.6%
Prince Rupert	54,481	46,371	17.5%	54,481	46,371	17.5%
BC Totals	224,851	185,348	21.3%	224,851	185,348	21.3%
US/BC Totals	2,173,289	1,998,335	8.8%	2,173,289	1,998,335	8.8%
US Total	1,948,438	1,812,987	7.5%	1,948,438	1,812,987	7.5%

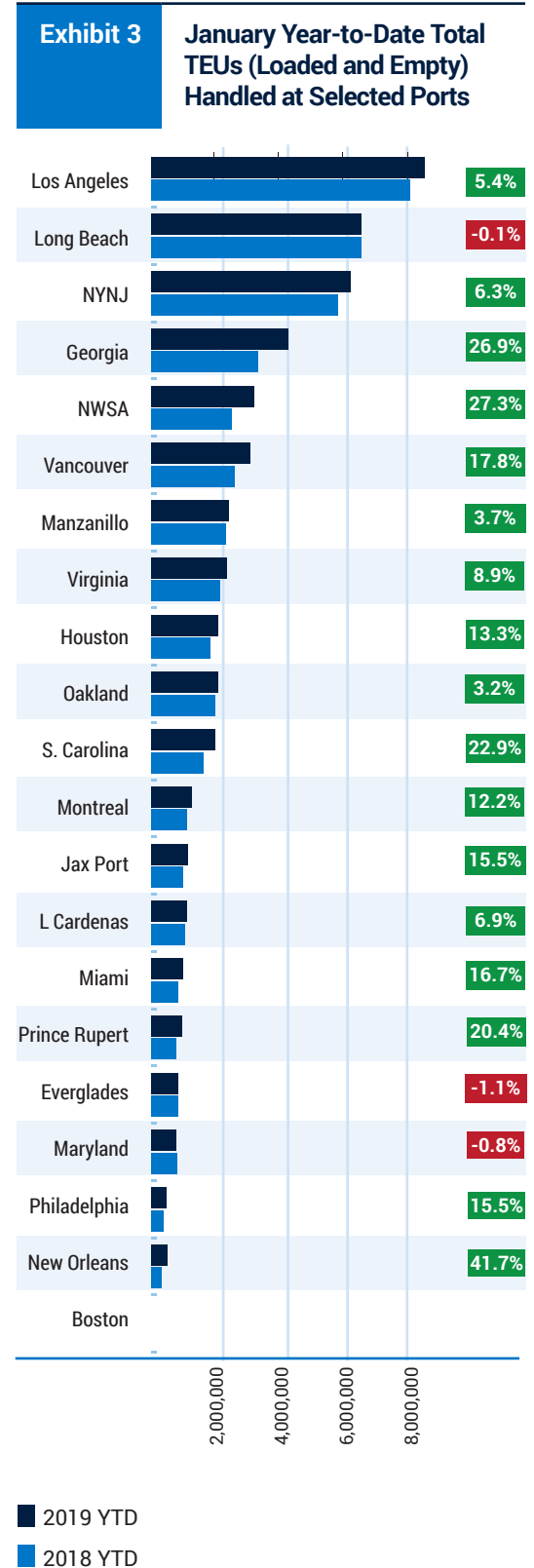
Source Individual Ports



Parsing the January 2019 Loaded TEU Numbers Continued

Exhibit 2 January 2019 - Outbound Loaded TEUs at Selected Ports						
	Jan 2019	Jan 2018	% Change	Jan 2019 YTD	Jan 2018 YTD	% Change
Los Angeles	144,993	150,035	-3.4%	144,993	150,035	-3.4%
Long Beach	117,288	120,503	-2.7%	117,288	120,503	-2.7%
San Pedro Bay Totals	262,281	270,538	-3.1%	262,281	270,538	-3.1%
Oakland	75,350	74,883	0.6%	75,350	74,883	0.6%
NWSA	72,859	67,571	7.8%	72,859	67,571	7.8%
USWC Totals	410,490	412,992	-0.6%	410,490	412,992	-0.6%
Boston						
NYNJ	111,833	112,893	-0.9%	111,833	112,893	-0.9%
Maryland	15,947	18,663	-14.6%	15,947	18,663	-14.6%
Virginia	77,948	76,294	2.2%	77,948	76,294	2.2%
South Carolina	63,750	59,746	6.7%	63,750	59,746	6.7%
Georgia	124,365	107,499	15.7%	124,365	107,499	15.7%
Jaxport	40,745	41,257	-1.2%	40,745	41,257	-1.2%
Port Everglades	33,662	34,403	-2.2%	33,662	34,403	-2.2%
Miami	38,852	32,493	19.6%	38,852	32,493	19.6%
USEC Totals	507,102	483,248	4.9%	507,102	483,248	4.9%
New Orleans	25,682	20,231	26.9%	25,682	20,231	26.9%
Houston	87,961	71,146	23.6%	87,961	71,146	23.6%
USGC Totals	113,643	91,377	24.4%	113,643	91,377	24.4%
Vancouver	91,400	76,129	20.1%	91,400	76,129	20.1%
Prince Rupert	17,156	14,483	18.5%	17,156	14,483	18.5%
British Columbia Totals	108,556	90,612	19.8%	108,556	90,612	19.8%
US/Canada Total	1,139,791	1,078,229	5.7%	1,139,791	1,078,229	5.7%
US Total	1,031,235	987,617	4.4%	1,031,235	987,617	4.4%

Source: Individual Ports



Source: Individual Ports



Parsing the January 2019 Loaded TEU Numbers Continued

Things were a bit different up the coast. The Northwest Seaport Alliance Ports of Tacoma and Seattle posted a remarkably 32.8% (31,793 TEUs) gain over January 2018, when the ports were still struggling with rejiggered shipping alliances and schedule changes. Even so, January imports were lower by 7.4% (-10,258 TEUs) from December. At Oakland, the inbound box trade in January exceeded the previous January's volume by 9.0% (+6,759 TEUs) but was down 5.9% (-5,161 TEUs) from the preceding month.

By comparison, the U.S. East Coast ports we monitor posted a combined increase of 10.1% (+80,589 TEUs) over January 2018. The only USEC port reporting a fall-off was Port Everglades, with inbound loads in January down 10.5% (-3,284 TEUs). Otherwise, ports in the Southeast recorded double-digit gains year-over-year.

Along the Gulf Coast, Houston posted a 6.6% (+5,875 TEUs) year-over-year gain in inbound loads in January but, like USWC ports, saw its December-to-January numbers fall, in its case by 4.1% (-4,083 TEUs).

Very much unlike their competitors along the Pacific Coast, the two British Columbia ports saw imports increase not only by 21.3% (+39,503 TEUs) in January but also by 18.0% (+34,377 TEUs) from December.

Focusing now on the mainland U.S. ports we track, import loads in January were up 7.5% (+135,451 TEUs) over the same month in 2018. Of that volume, the Big Five USWC ports accounted for a 49.5% share, down from 50.7% the previous January.

Export Traffic

Highly mixed would be one benign way of describing outbound loaded container traffic in January. In San Pedro Bay, exports were down 3.1% (-8,257 TEUs) from the first month of last year. Oakland posted a modest 0.6% (+467 TEUs) increase, while the NWSA ports rang up a 7.8% (+5,288 TEUs) gain. Because of the deficits in Southern California, however, the USWC exported 2,502 fewer loaded TEUs in January than they had a year earlier.

Back East, USEC ports were posting export increases as high as 15.7% (+16,866 TEUs) at Savannah to lows like the 0.9% (-1,060 TEUs) fall-off at the Port of New York/

New Jersey and the -14.6% (-2,716 TEUs) in Maryland. Altogether, the USEC ports we track saw outbound loaded traffic grow 4.9% (+23,854 TEUs) from January 2018.

Along the Gulf Coast, New Orleans bested Houston's year-over-year percentage increase with a 26.9% (+5,451 TEUs) jump in export loads. Together, the two USGC ports we monitor saw exports grow in January by 24.4% (+22,266 TEUs) in 2018.

In British Columbia, both major ports saw major bumps in exports in January. At Prince Rupert, outbound loads were up 18.5% (+2,673 TEUs) over the same month a year earlier, while Vancouver recorded a 20.1% (+15,271 TEUs) gain.

Looking solely at the U.S. mainland ports that we survey, January's container export trade was 4.4% (+43,618 TEUs) above the volume in January 2018. However, the Big Five USWC ports accounted for 39.8% of that trade, down from a 41.8% a year earlier.

Northwest Seaport Alliance. Statistics compiled by the Pacific Maritime Association show that January loaded imports at the Port of Tacoma were up by 23.2% (+13,511 TEUs) from last January, while outbound traffic rose 3.2% (+1,739 TEUs). At the Port of Seattle, import containers rose 19.1% (+9,602 TEUs), while outbound shipments were up 11.8% (+3,798 TEUs). We hasten to add our usual caveat that PMA numbers often differ from those collected by the ports themselves. We offer the PMA statistics only to shed light on how the two partners in the NWSA are faring individually.

Weights, Values, and the Federal Government Shutdown.

That federal government shutdown earlier this year continues to affect the publication dates of official U.S. trade statistics. The import/export numbers for December 2018, originally scheduled for publication on February 5, were not available until March 6. That's why we're tardy in posting the numbers on the declared weight and value of the containerized goods that passed through mainland ports in last year's final month. Port TEU counts and federal data on containerized maritime trade won't sync again until May, when we'll all be on the same page with the March 2019 TEU numbers.



Parsing the January 2019 Loaded TEU Numbers Continued

Exhibit 4 USWC Shares of U.S. Mainland Container Trade, December 2018

	Dec 2018	Nov 2018	Dec 2017
USWC Share of Mainland U.S. Containerized Imports			
By Weight	41.5%	41.2%	40.2%
By Value	49.0%	49.1%	48.5%
USWC Share of Mainland U.S. Containerized Exports			
By Weight	40.0%	39.8%	35.3%
By Value	33.5%	34.2%	33.9%
USWC Share of Mainland U.S. Containerized Imports from East Asia			
By Weight	59.2%	59.0%	57.8%
By Value	68.0%	68.5%	67.4%
USWC Share of Mainland U.S. Containerized Exports to East Asia			
By Weight	62.5%	62.7%	55.0%
By Value	63.5%	66.1%	63.2%

Source: U.S. Commerce Department.

Exhibit 5 USWC Ports' Shares of U.S. Mainland Container Trade, December 2018

	Dec 2018	Nov 2018	Dec 2017
Shares of U.S. Mainland Ports Containerized Import Tonnage			
LA/LB	30.4%	29.5%	29.8%
Oakland	3.9%	4.0%	4.2%
NWSA	5.7%	6.2%	5.3%
Shares of U.S. Mainland Ports Containerized Import Value			
LA/LB	37.7%	37.2%	37.3%
Oakland	3.7%	3.6%	3.6%
NWSA	7.0%	7.6%	6.8%
Shares of U.S. Mainland Containerized Export Tonnage			
LA/LB	23.0%	23.6%	21.4%
Oakland	6.5%	6.2%	5.7%
NWSA	10.4%	9.6%	7.8%
Shares of U.S. Mainland Containerized Export Value			
LA/LB	21.7%	22.1%	22.2%
Oakland	6.7%	6.9%	6.7%
NWSA	4.7%	4.7%	4.6%

Source: U.S. Commerce Department.

Exhibits 4 and 5 present the USWC shares of the U.S. mainland port container trade in terms of the declared weight and value of containerized shipments in December 2018.

The East Asia Trade. Now looking at those December figures on declared weights and dollar values, the tariff-driven wave of imports crested mainly on the USWC. In tonnage terms, the USWC ports saw a 17.8% year-over-year jump in containerized imports from East Asia, while all other mainland ports witnessed an 11.2% gain. As Exhibit 4 reveals, fully 59.2% of containerized import tonnage from East Asia passed through USWC gateways. The San Pedro Bay ports recorded a 16.5% increase over the previous December, while the growth at the NWSA ports reached

24.3%. Oakland's y/y gain was 14.6%. In dollar terms, the USWC share of containerized shipments from East Asia through mainland ports rose to 68.0% from 67.4% the previous December. The share held by LA/LB edged up to 53.3% from 53.0%, while the NWSA share rose to 9.7% from 9.5% and Oakland's portion inched up to 4.4% from 4.2%.

Soybeans

The peak shipping season for U.S. soybeans has historically been from October through March. We now have data on the first half of that season in 2018. U.S. soybean maritime shipments worldwide were down 44.1% to 13,538.94 million metric tons from 24,226.85 million metric tons in the last quarter of 2017. The fall-off was due primarily to China's decision to effectively stop



Parsing the January 2019 Loaded TEU Numbers [Continued](#)

importing U.S. soybeans in retaliation for higher tariffs President Trump imposed on Chinese products. This had a disproportionately acute impact on ports in the Pacific Northwest.

In terms of tonnage handled, the Port of Kalama on the Washington side of the Columbia River was the nation's fourth largest soybean export gateway after three Gulf Coast ports in the final quarter of 2017 with 1,916.51 million metric tons. Longview, another Columbia River port in Washington State was not far behind with 1,190.45 million metric tons of soybean exports. A third river port, Vancouver (WA) shipped just over half a million metric tons. A year later, Kalama's soybean export trade had collapsed. In the last quarter of 2018, Kalama's soybean export volume had fallen by 93.4%, while Longview (-95.8%) and Vancouver (-89.1%) also suffered almost total declines in soybean exports. Those drops were entirely attributable to the collapse of the export trade with China.

Future data will likely reveal some resumption in soybean flows through the riverine ports in the PNW now that China has made promises to return to the market for U.S. soybeans. The question remains, though, whether America's soybean exporters will decide to lessen their dependence on the China market in favor of diversifying exports to markets not well-served by ports in the Pacific Northwest.

Jock O'Connell's Commentary: An Oblique Ode to Baseball

Let's start this month's commentary on a sporting note.

I love baseball. I love the memory of my first major league game and seeing a guy named Mantle hit a tenth inning home run over Fenway Park's Green Monster...and over the head of a guy named Williams, Boston's about-to-retire left-fielder that cloudy September afternoon back in 1960. I love the slow pace of a game that affords fans ample time to converse and comment and analyze each move before every pitch. I love the rituals and terminology, both ancient and new that place the game in a broader

First Glimpse at February's Numbers

The Ports of Los Angeles and Long Beach report significant year-over-year declines in both import and export loads in February. At LA, inbound loaded TEUs were down 9.1% from the same month last year, while loaded export TEUs were off by 9.5%. Next door at Long Beach, import loads fell even more (-11.5%), while export loads plummeted by 19.6%. Oakland, meanwhile, recorded a 5.0% drop in inbound loads and an 8.2% fall-off in loaded outbound TEUs. At the Northwest Seaport Alliance Ports, comparisons with February 2018 were negative both coming and going. Imports were down 12.7%, while exports were off by 13.8%.

Adding up the numbers, last month's traffic at the Big Five USWC container ports was down substantially from February 2018. Inbound loads were off by 10.1%, while outbound loads were down by 12.5%.

Up in British Columbia, the fast-emerging Port of Prince Rupert reported an 18.3% year-over-year decline in inbound loaded TEUs and an 18.1% drop in outbound loaded TEUs. Vancouver's February statistics were skewed by an accident in which a gantry crane toppled and effectively crippled operations for a few days at the port's Global Container Terminal, the port's most productive terminal. Inbound loads were down 10.0% from February 2018. However, outbound loads were up 7.9%.

context of American life. I love the old war movies where suspicious GIs challenge possible German infiltrators by demanding they describe a Texas-leaguer. I love knowing the players on the field will likely retire without brains scrambled by repeated concussions. And now I love watching the Red Sox live in HD so clear I think I can recognize old college classmates several rows up in the stands in Fenway.

What I don't love is the unseemly haste with which various parties seem bent, whether intentional or not, on



Commentary *Continued*

putting the Port of Oakland out of business. For as much as I love baseball, I ...okay, I don't love the Port of Oakland. But I do love the role it plays in Northern California's economy. I love the diverse wares it brings from abroad to the stores I frequent and, if I were a regional importer or exporter, I would love knowing I have a major maritime gateway so close at hand. And if I drove a truck or a train, or if I worked on the dock or in a warehouse, I would absolutely love how much the port matters to me, my family, and the communities in which we all reside.

The Port will very soon release a new economic impact report that will likely underscore the Port's expanding contribution to the regional economy since the last such report was delivered in 2011. That report revealed that, in the preceding year, the Port's maritime operations supported nearly 29,000 jobs and accounted for \$2.2 billion in wages and salaries, \$2.1 billion in business revenues, and \$233.3 million in state and local taxes.

By comparison, a study by the Bay Area Council's Economic Institute found that "a new downtown stadium could provide \$3 billion of economic benefit to the city over 10 years."

So I'm puzzled by why anyone would offer to build an amusement park on a toxic waste site in close proximity to such a vital economic asset. I'm also dubious of how proponents hope to fill the park's 35,000 seats without resorting to specious contrivances such as gondolas, ferries, funiculars, drones, kites, or hot air balloons. (The proposed gondola would link the stadium with the 12th Street BART station and could, according to ballpark planners, transport as many as 6,000 people per hour...to a stadium that would seat nearly six times that number.)

Fortunately, I'm not a solitary voice in the right-field bleachers fearing the gentrification of an industrial neighborhood. Among the organizations that have weighed in with their reservations about the project or the accelerated process for gaining its regulatory approval are:

- Sierra Club of California
- Save the Bay
- Golden Gate Audubon Society

- Sierra Club of San Francisco Bay
- International Longshore and Warehouse Union (Locals 6, 10, 34, and 91)
- California Trucking Association
- Harbor Trucking Association
- The American Waterway Operators
- Marine Engineers' Beneficial Association
- Marine Firemen's Union
- Inland Boatmen's Union
- Schnitzer Steel Industries, Inc.
- Customs Brokers and Forwarders Association of Northern California
- Sailors' Union of the Pacific
- Transportation Institute
- Agriculture Transportation Coalition
- Pacific Merchant Shipping Association

Why does this proposal present an existential danger for the Port and all who derive their livelihoods from its continued operation? The latest iteration of the Howard Terminal Stadium proposal includes provisions for 3,000-4,000 housing units to be built next to the new ballpark. While there is no question the City of Oakland, along with the rest of California, desperately needs more housing, the scheme would create a new constituency that will certainly come to have predictable grievances about living next to an active port with loud and frequent ship, truck, and rail movements. At present, it's a set of grievances heard mainly from residents of nearby lower-income neighborhoods and framed largely in environmental justice terms. But, if you truly desire to hamstring the port's future, building upscale housing next door is a sure-fire formula. The well-heeled denizens of the skybox penthouse condos the A's propose to build next to the ballpark should have infinitely more clout at city hall than those currently aggrieved by port activities. Perhaps that's why social justice groups that have long lamented the port's presence have shown themselves so eager to work with Oakland A's officials on the ballpark proposal.

Cleaning up the toxic materials that have for decades leached into the soil should not be written off as a mere technical hurdle. Anyone following the travails of the redevelopment of the Hunters Point naval shipyard across the Bay should appreciate how difficult and controversial



Commentary [Continued](#)

clean-ups of contaminated soil can be. “They’re very nasty materials,” Dan Hirsch, retired director of the Environmental and Nuclear Policy Program at UC Santa Cruz recently told a Chronicle reporter. “People are scared of radiation. They should be just as scared of these chemicals,” Hirsch added.

As the San Francisco Chronicle recently observed, the politically powerful organization Save the Bay is raising questions about the environmental impacts of the project, and the bar pilots’ association, whose members steer container ships into the Port, warn they may be blinded by the ballpark’s lights and might even run over kayakers vying for home run balls. Then there are the port’s existing business tenants, who are worried about the impact of the traffic a new stadium would generate.

“This is not a transit-accessible area, so more people will be traveling there in cars, and the more people traveling in cars, the more we contribute to climate change,” Save

the Bay Executive Director David Lewis told San Francisco Chronicle columnist Phil Matier last month.

The opposition is mobilizing because of a concern about a behind-the-scenes effort to get state lawmakers to enact a bill to fast-track the permitting process for the stadium.

Interestingly, just two years ago when the A’s floated a scheme to build a new downtown stadium next to Laney College, Oakland Mayor Libby Schaaf said she worried that that ballpark might disrupt a neighborhood and displace residents. Evidently, she’s now much less worried that the proposed Howard Terminal field might disrupt operations at a port that contributes mightily to Oakland’s economy.

Disclaimer: *The views expressed in Jock’s commentaries are his own and may not reflect the positions of the Pacific Merchant Shipping Association.*

Port Tenants Thrown A Curve?

By **John McLaurin**
President, Pacific Merchant Shipping Association

Over the years the Port of Oakland has enjoyed a reputation for solid management, responsiveness and innovation. It has been well-deserved as demonstrated by its environmental achievements, high volume of ship calls and balanced growth in import and export cargo at the seaport.

As a result, its tenants and customers have invested billions of dollars in infrastructure and equipment.

But going forward, the Port of Oakland’s reputation is being shaped by how it responds to the efforts of a major league baseball team that is pursuing the construction of a 35,000-seat ballpark, 4,000 residential housing units,

millions of square feet in commercial retail, and a hotel development within the boundaries of the Port.

The development is being touted as transformational for the City of Oakland. But absent from the debate is a fundamental question about the impact this project will have on the maritime and international trade operations of the Port of Oakland.

The Port of Oakland supports tens of thousands of middle class jobs. Its economic impact extends beyond the immediate area surrounding the Port ranging from the Central and Salinas Valleys to Nevada and well beyond.



Port Tenants Thrown a Curve? [Continued](#)

A core question is whether public officials are willing to sacrifice a thriving, well-run commercial seaport to create another entertainment and housing venue that could be built anywhere – including the site where the ball club currently plays.

The members of the Oakland Port Commission are trustees with fiduciary duties to the Port, the State and their underwriters – and they owe thoughtful, critical review and consideration of the needs of their core business and the commercial success of their tenants and customers. Marine terminal leases and ocean carrier business operations provide over \$140 million in annual revenue to the Port – revenue which is necessary to finance their \$100 million annual debt service payments.

Unfortunately, recent public comments have confirmed that raising questions of how to analyze the impacts that the housing and stadium project will have on seaport operations will be viewed as offensive to supporters of the proposal.

A broad coalition of labor, environmental, cargo-owners, truckers and seaport organizations (including PMSA) jointly submitted a letter to the Legislature in February, urging that the current laws outlining the environmental review and land use regulation processes for the Howard Terminal development project not be weakened or given special dispensation. The message of this coalition was simple and straightforward – follow the same environmental standards that everyone else is required to follow for any project at the Port.

The reactions to this simple request were swift, dismissive, and derisive. This included social media commentary by a port commissioner who announced that he would be voting “yes” on the project even though the Port is still engaged in negotiations on the project. The port commissioner also questioned the motives of environmental groups which were asking for the project to follow existing environmental requirements and attacked the trucking industry, calling their operations “#environmental racism”. The port commissioner’s comments were contrary to the data from port staff that shows dramatic reductions in port related emissions and, after the expenditure of hundreds of millions of dollars in new and innovative technologies, that the cleanest trucks that operate in California operate at the ports.

In addition, while the ballclub responded to the coalition letter by stating in the press that they were not seeking to reduce any environmental reviews, only the day before they had been circulating draft legislation in the State Capitol to remove critical review of the terminal project by local environmental regulators.

The tenants, customers and all those that derive their livelihood from the Port of Oakland deserve better.

But if the recent public comments of ballpark proponents are any indication, an open and honest debate and a full and complete analysis of the Howard Terminal project will not be forthcoming. The workers, tenants and customers of the Port of Oakland will be called “out” on strikes without even being given the opportunity to get up to bat.

Interested in membership in PMSA?

Contact Laura Germany for details at: lgermany@pmsaship.com or 510-987-5000.

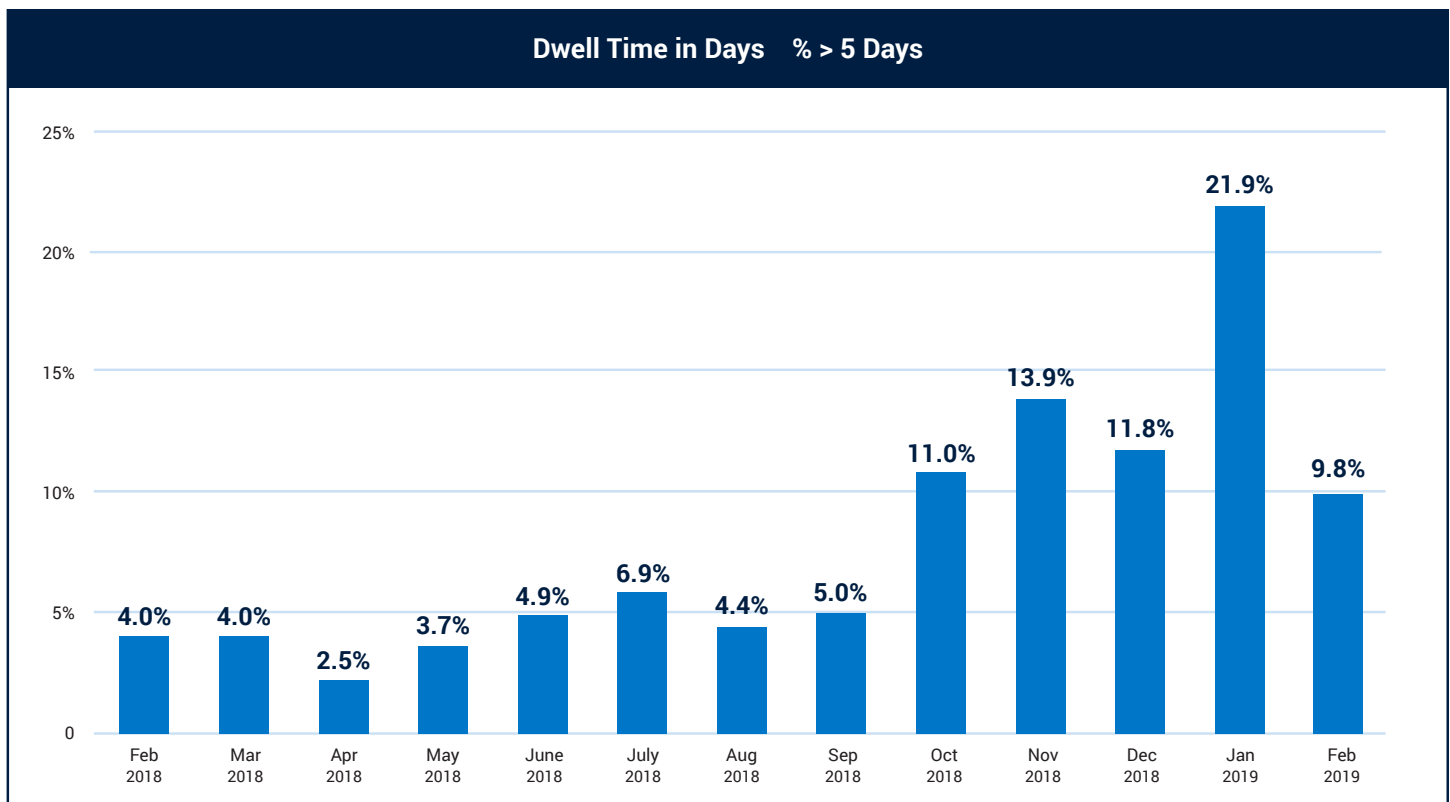
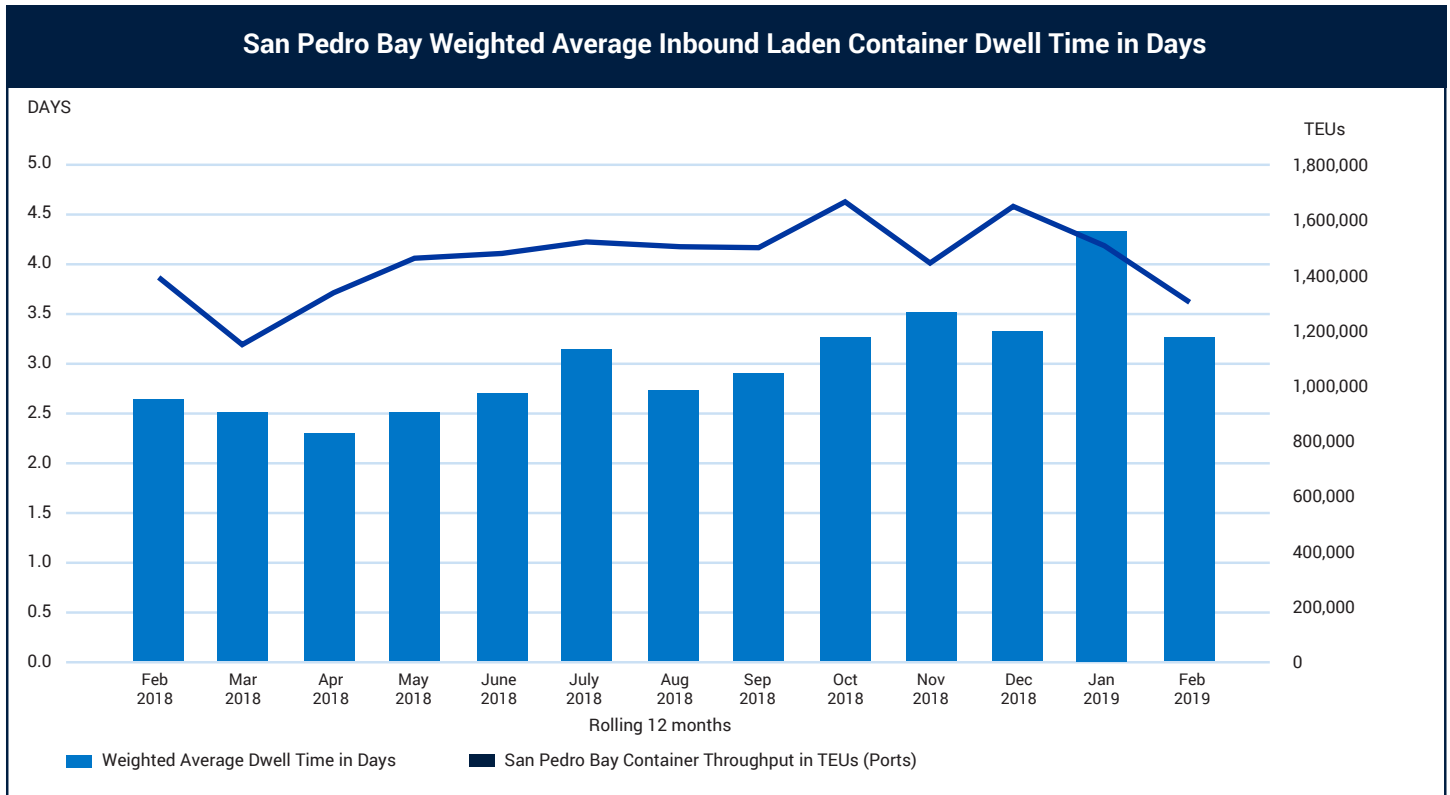
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February Dwell Time Numbers Are Down





PMSA

PACIFIC MERCHANT SHIPPING ASSOCIATION

Annual Luncheon

Tuesday, April 16, 2019

Hyatt Regency - Ballroom
200 S. Pine Ave.
Long Beach, CA

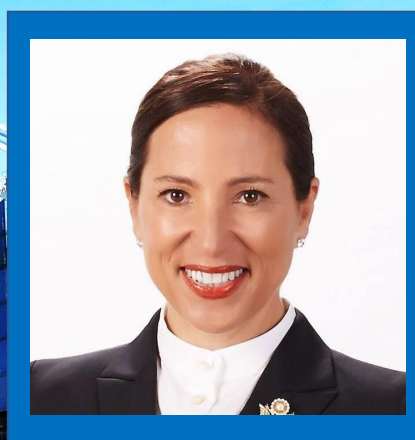
11:30 a.m. Registration
12:00 p.m. Lunch

\$65 Registration
\$800 Gold Sponsorship
\$1,600 Platinum Sponsorship

Proceeds go to the PMSA Foundation

Keynote Speaker:

Lt. Governor Eleni Kounalakis
State of California



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