



Southern California's Ports and Goods Movement Industry 2015



Keeping California Ports Competitive

California Senate Informational Hearing
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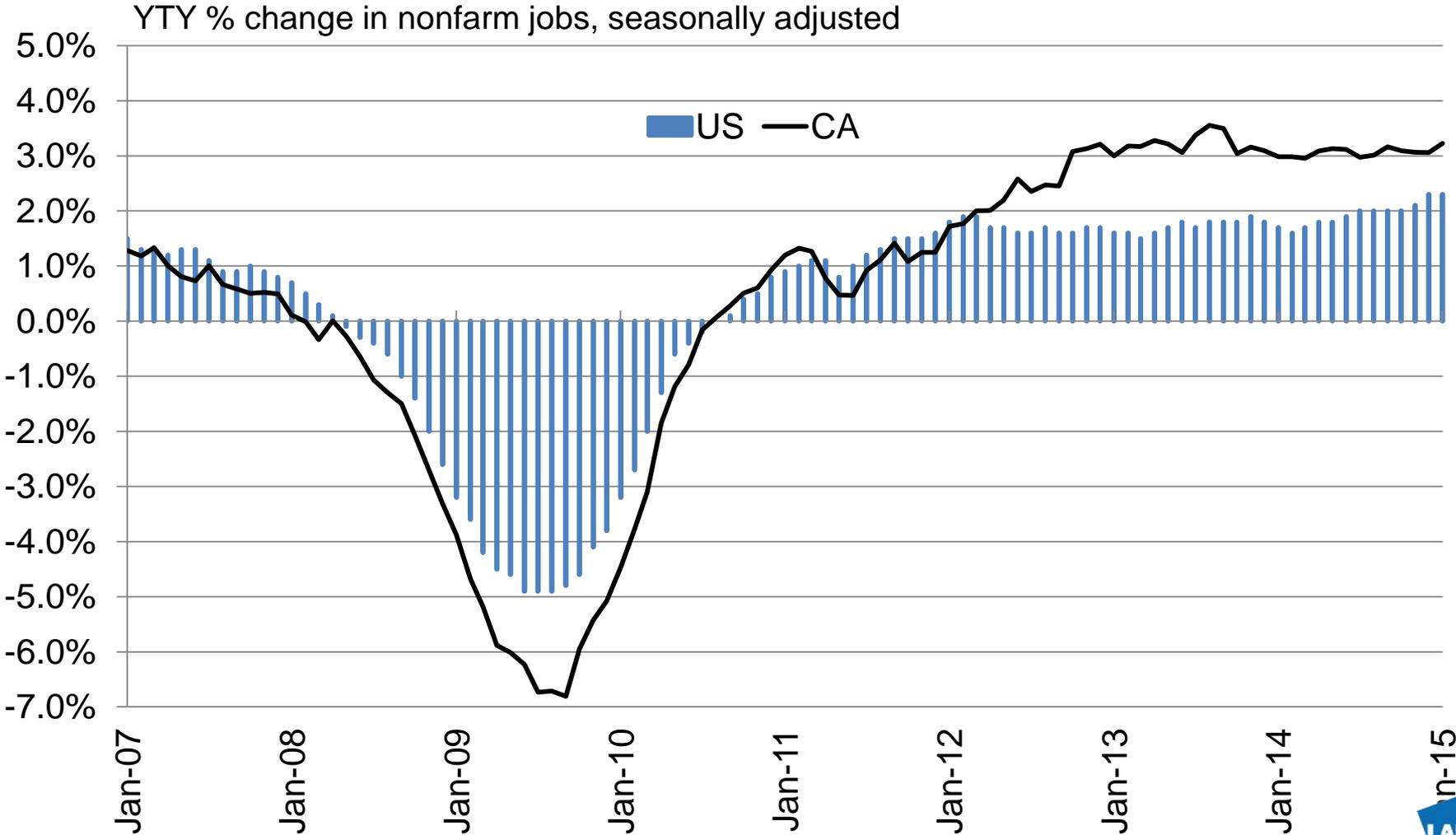
Outline

- U.S. & CA Economies
- Los Angeles County/So Cal Trade Trends
- Conclusion

The background of the slide features two flags flying against a clear blue sky. On the left is the United States flag, and on the right is the California state flag, which includes the word 'CALIFORNIA' and a grizzly bear. The title 'U.S. & California Economies' is overlaid in a large, bold, blue font.

U.S. & California Economies

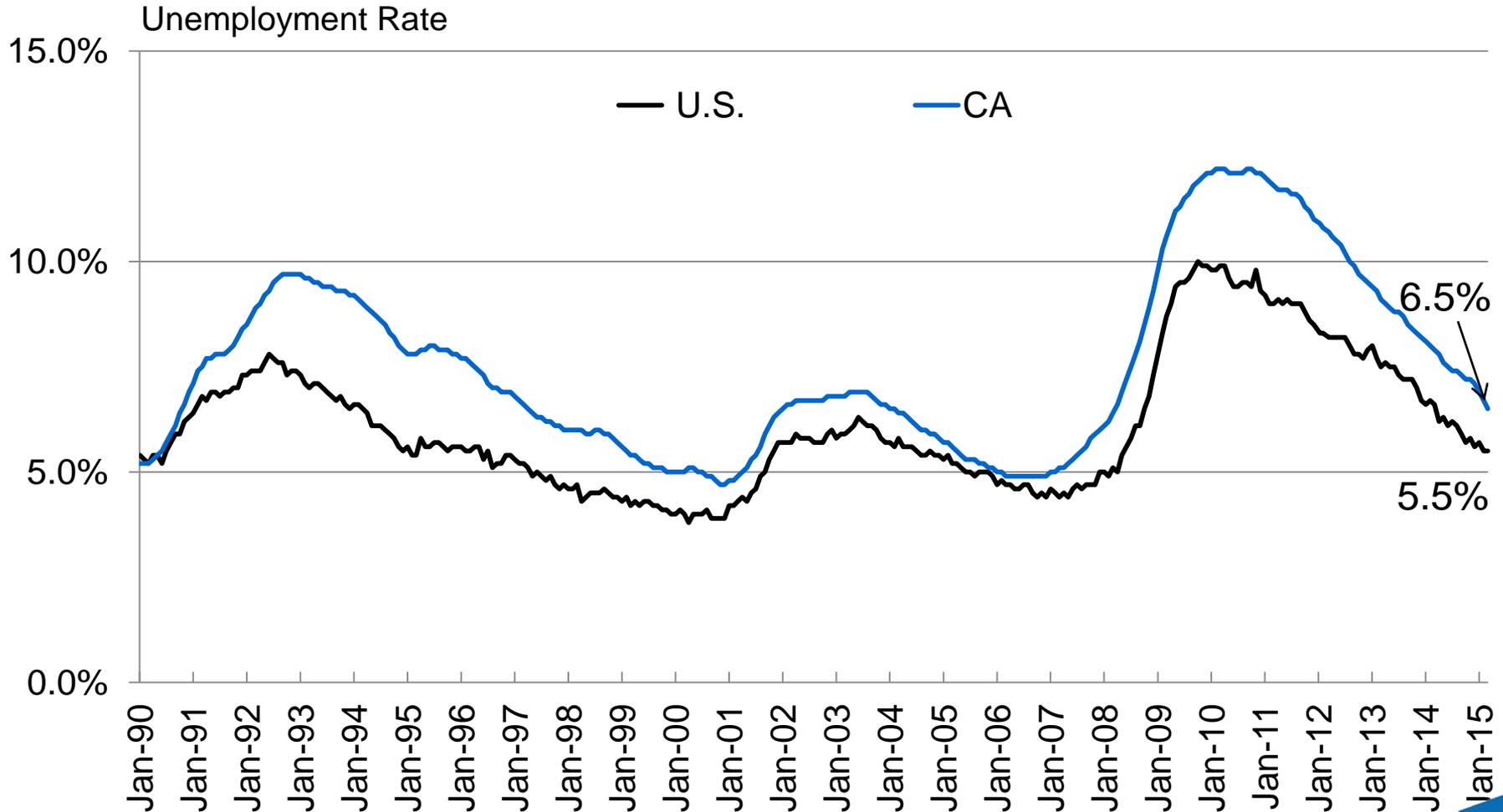
California Adding Jobs Faster than U.S.



Source: US BLS, CA EDD



Labor Mkts in US & CA Nearly Healed



Source: US BLS, CA EDD

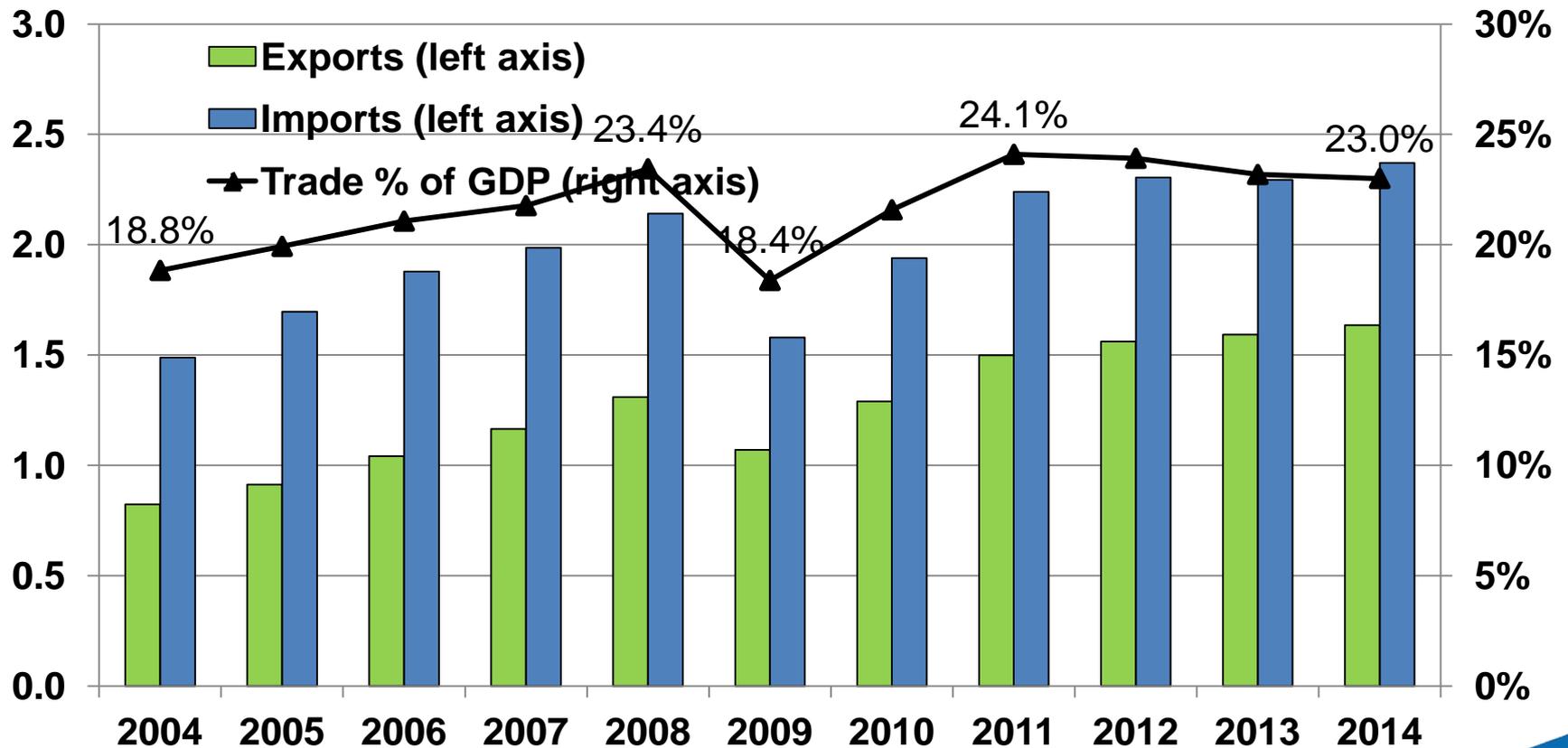
U.S. Economic Forecast

	2012	2013	2014	2015f	2016f
Real GDP - Annual % Chg.	2.3%	2.2%	2.4%	3.0%	3.0%
Nonfarm Jobs - Annual % Chg.	1.7%	1.7%	1.9%	1.9%	1.8%
Unemployment Rate	8.1%	7.4%	6.2%	5.6%	5.4%
Consumer Prices - Annual % Chg.	2.1%	1.5%	1.6%	1.3%	2.3%

Total U.S. Goods Trade

Exports, Imports of Goods
\$ in Trillions

Goods Trade
as % of GDP



Source: BEA



Los Angeles County Goods Movement/Trade Trends

Major Industries in Los Angeles County

TRADED INDUSTRIES (Generate New Income)

- International Trade
- Entertainment
- Business Services
- Aerospace
- Fashion & Apparel
- Tourism
- Knowledge Creation

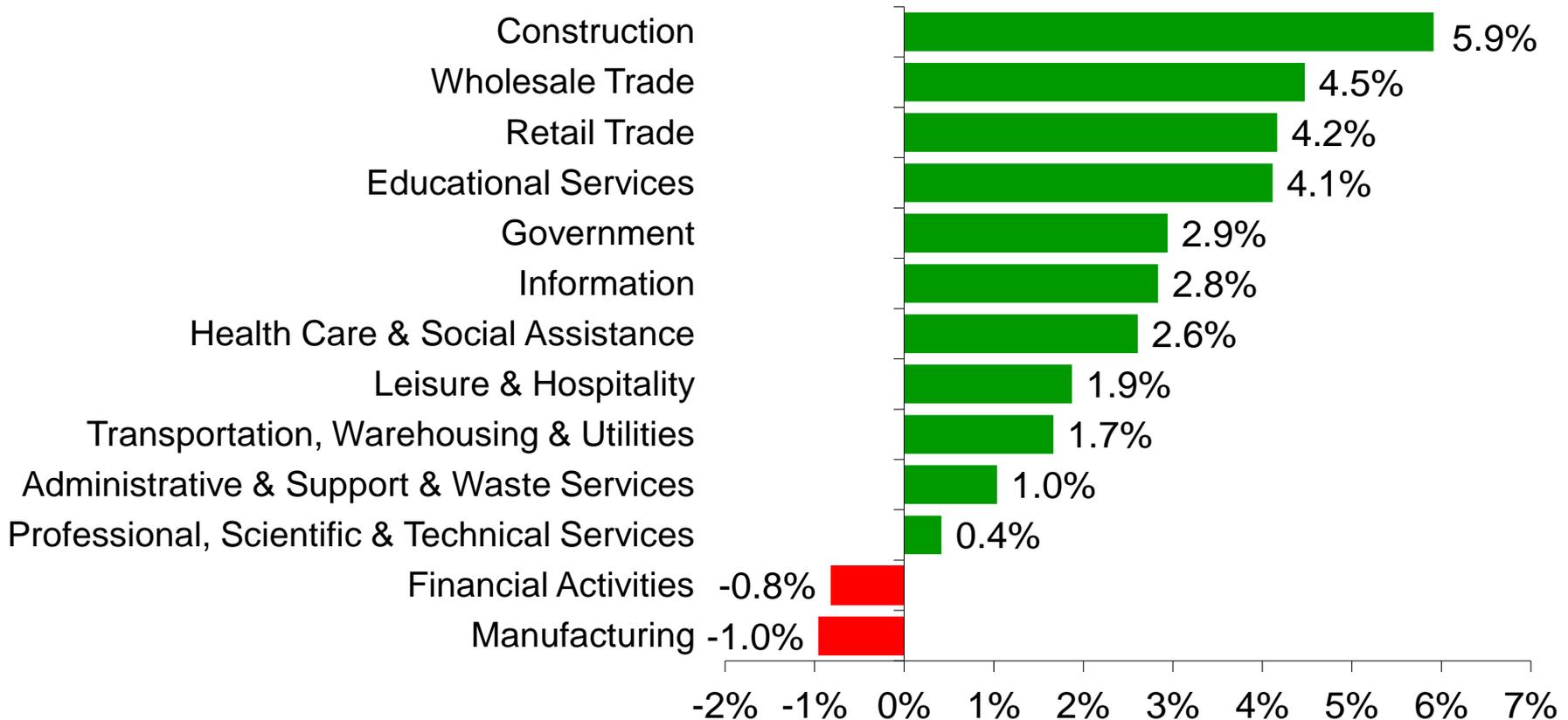
LOCAL INDUSTRIES (Circulate Income)

- Retail Sales
- Leisure & Hospitality
- Health Care/Social Assistance

Job Trends by Industry – Los Angeles

YTY % change in nonfarm employment by industry, not seasonally adjusted

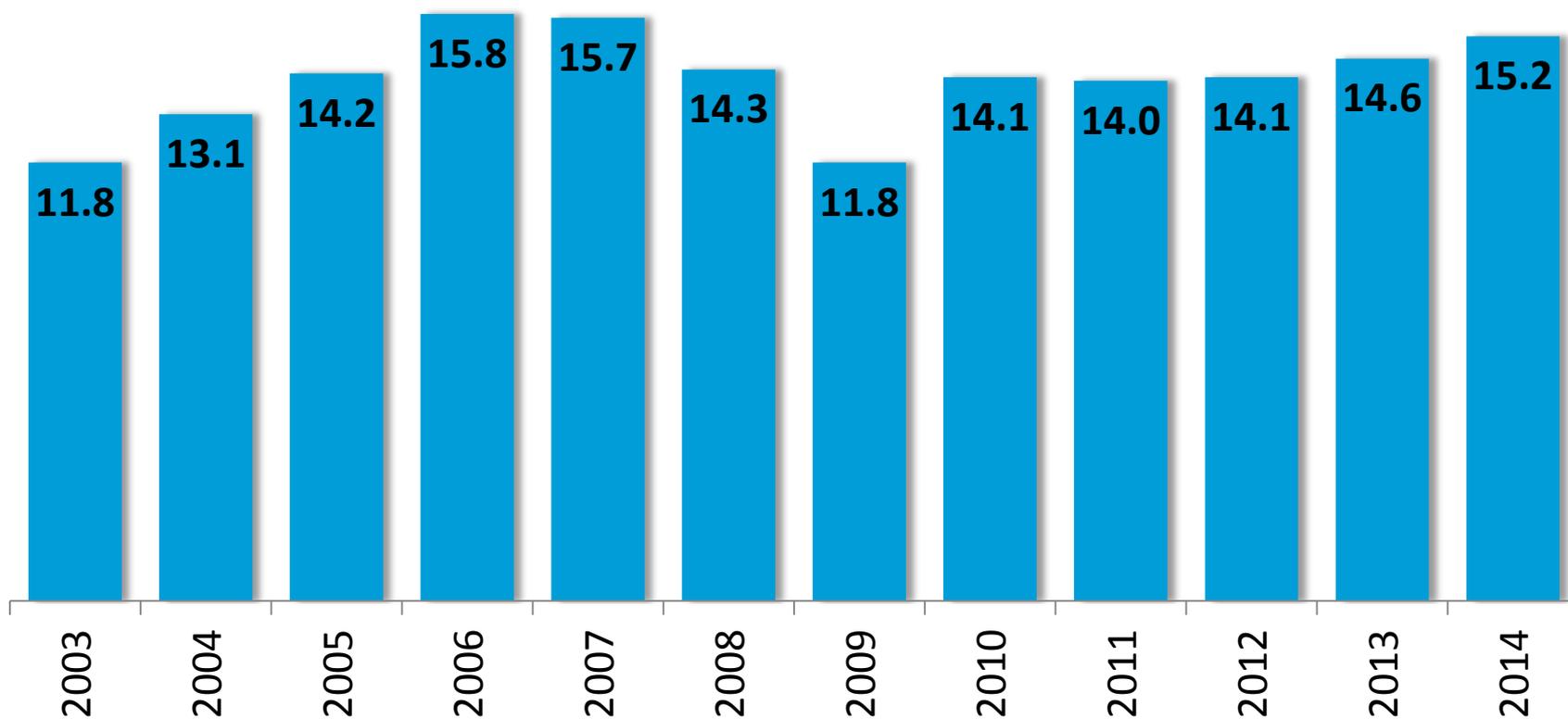
Feb 2015: +101,100 jobs, +2.4% YTY; u-rate: 7.7%



Container Throughput San Pedro Bay Ports

Millions of TEUs

Mar 2015 YTD: -4.3%



Sources: Ports of Los Angeles and Long Beach; forecast by LAEDC

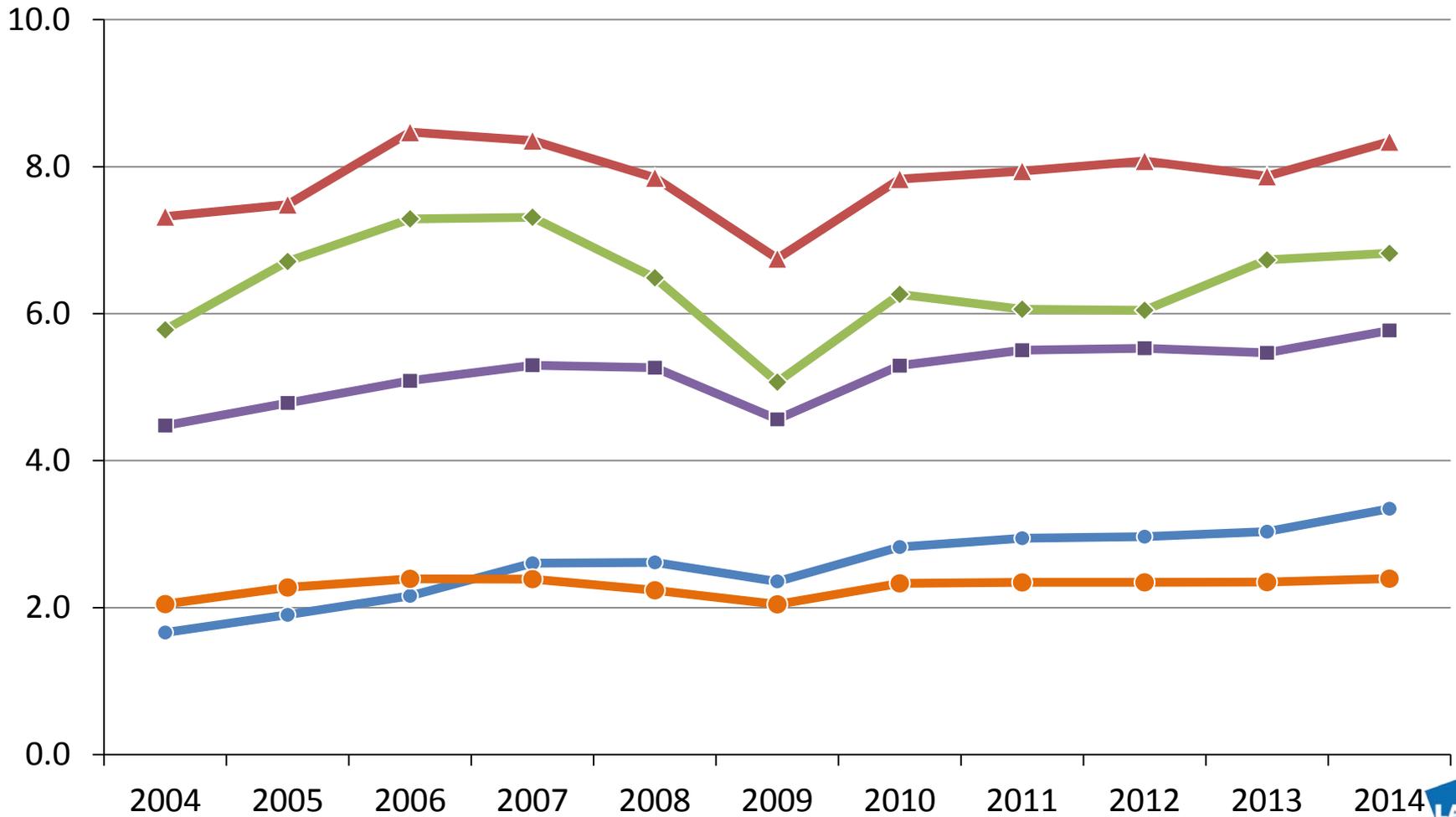


International Container Traffic

at Nation's Major Ports

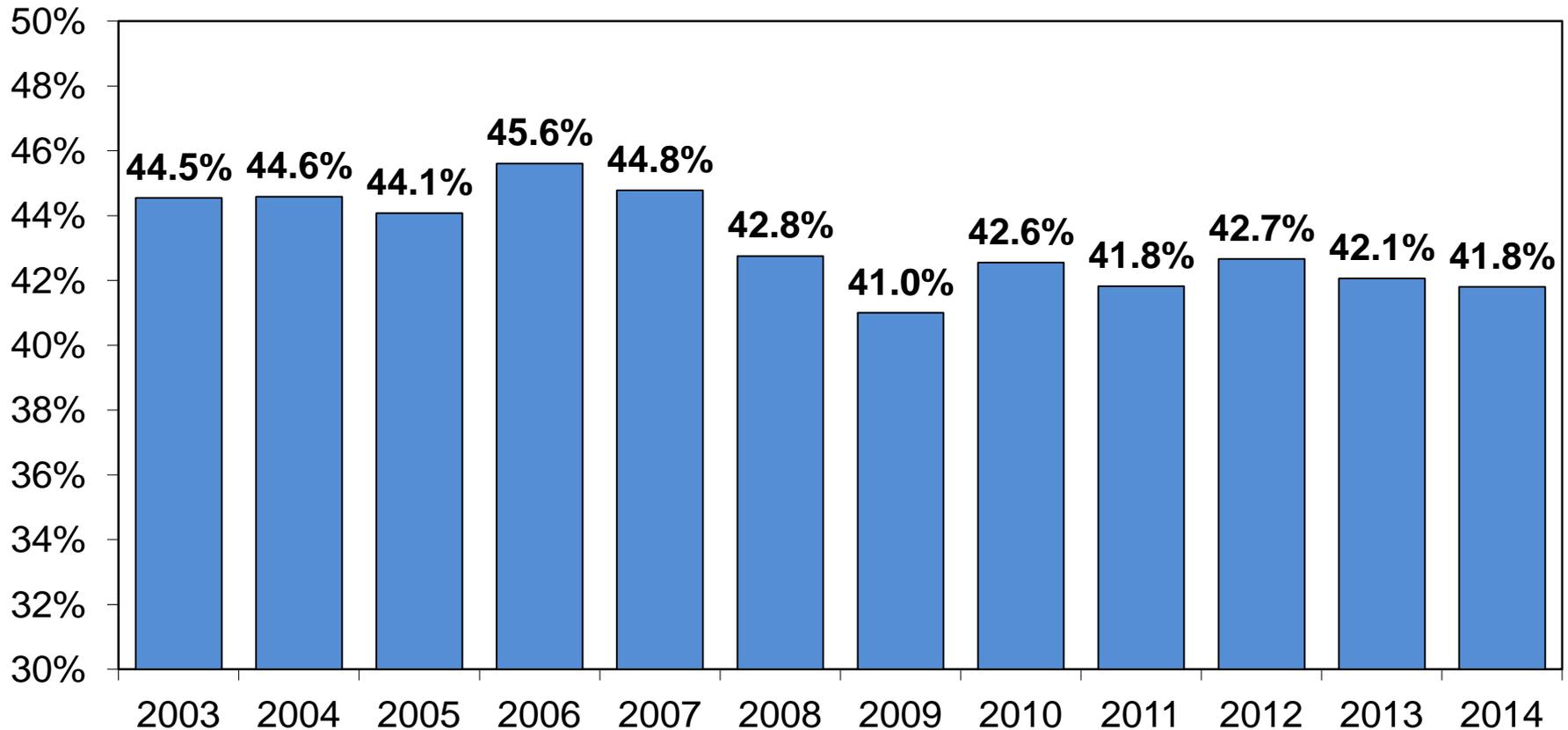
Millions of TEUs

■ New York ▲ Los Angeles ◆ Long Beach ● Savannah ● Oakland



San Pedro Ports Dominate Top 10

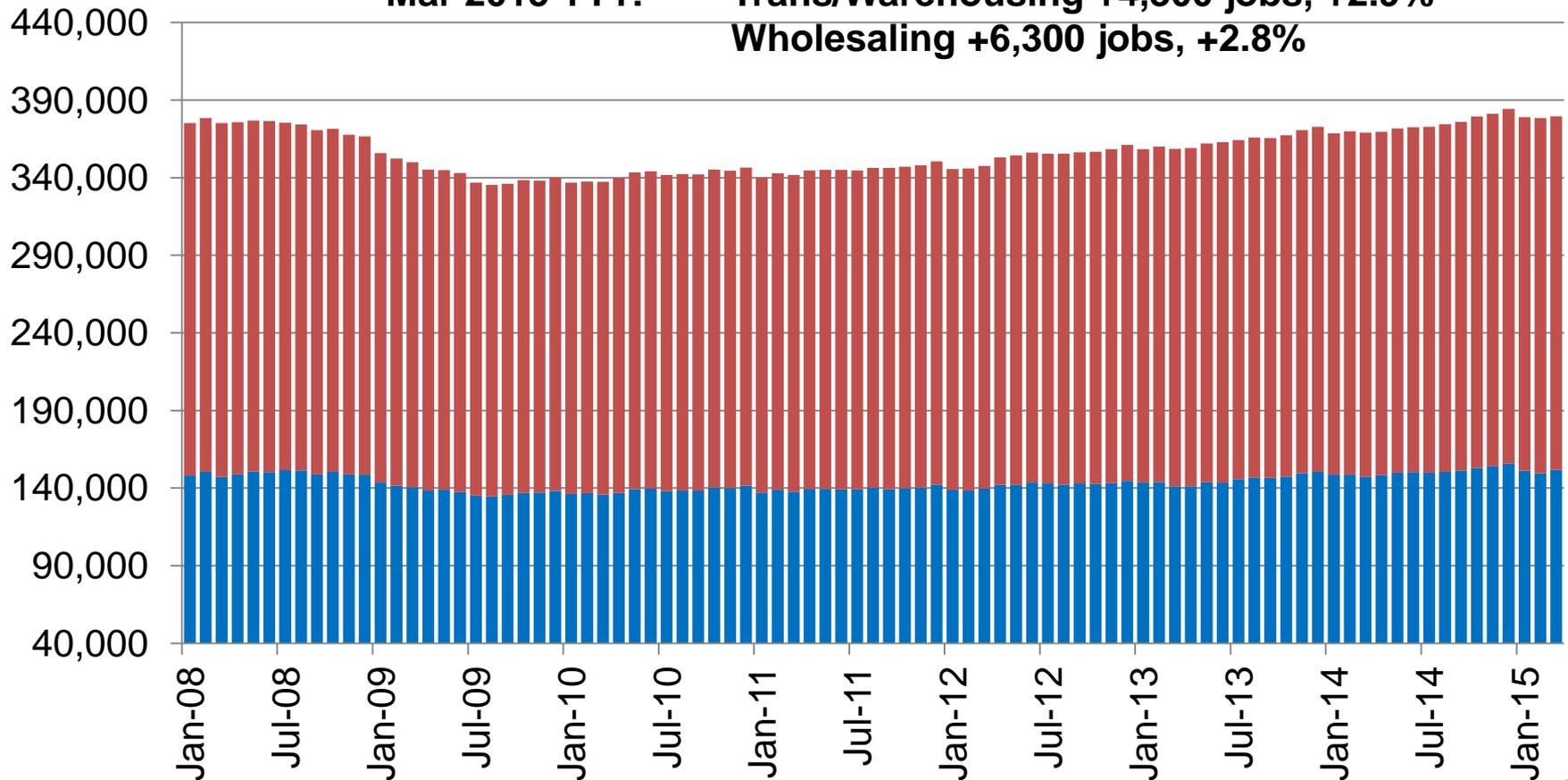
POLA/POLB Containers as a Share of Top Ten Total



Source: Port Statistical Releases, Compiled by LAEDC

L.A. County Trans/Warehousing & Wholesale Employment

Mar 2015 YTY: **Trans/Warehousing +4,300 jobs, +2.9%**
Wholesaling +6,300 jobs, +2.8%

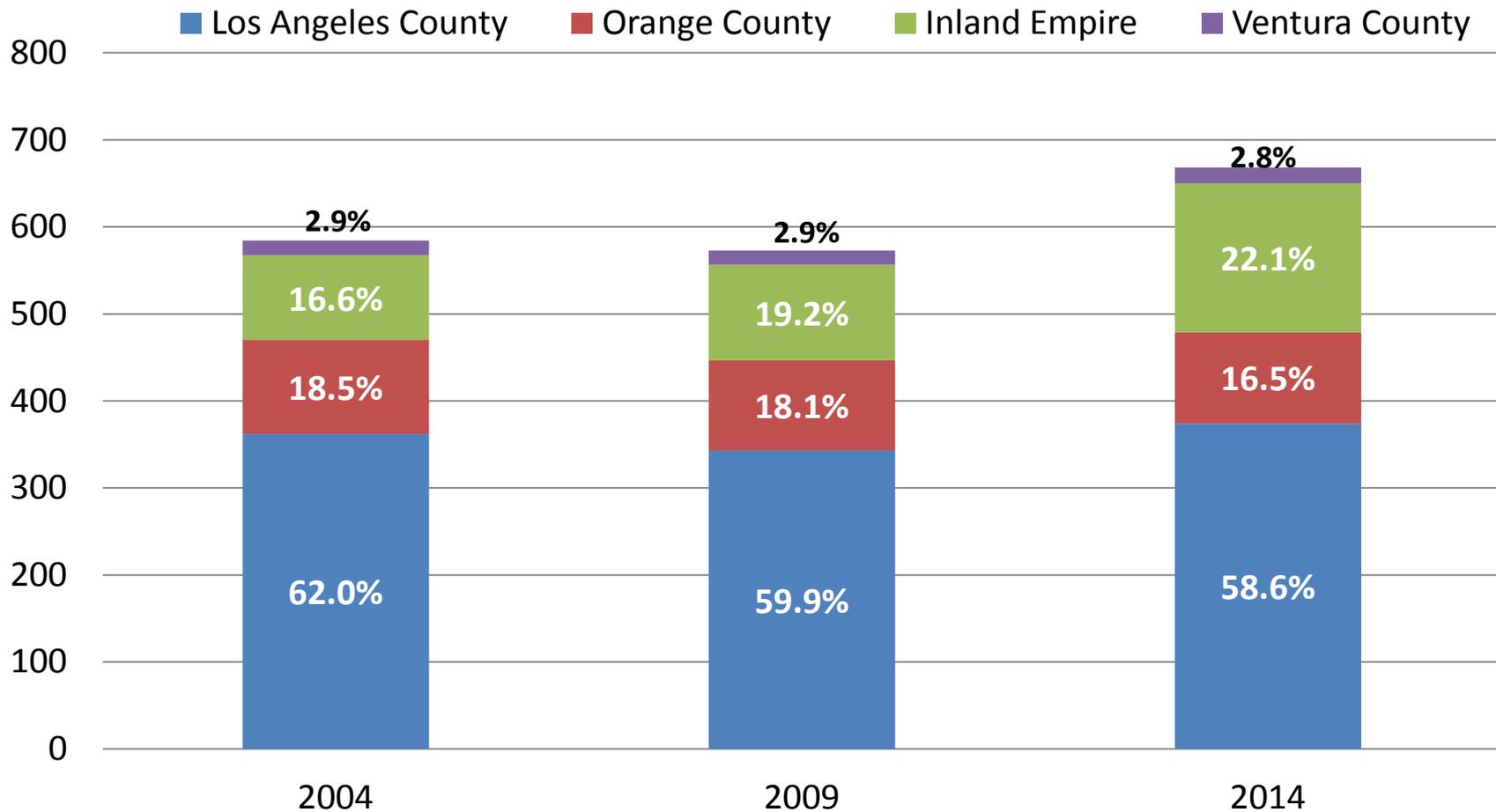


Source: CA EDD, Labor Market Information Division

Trade-related Employment

with employment shares by county

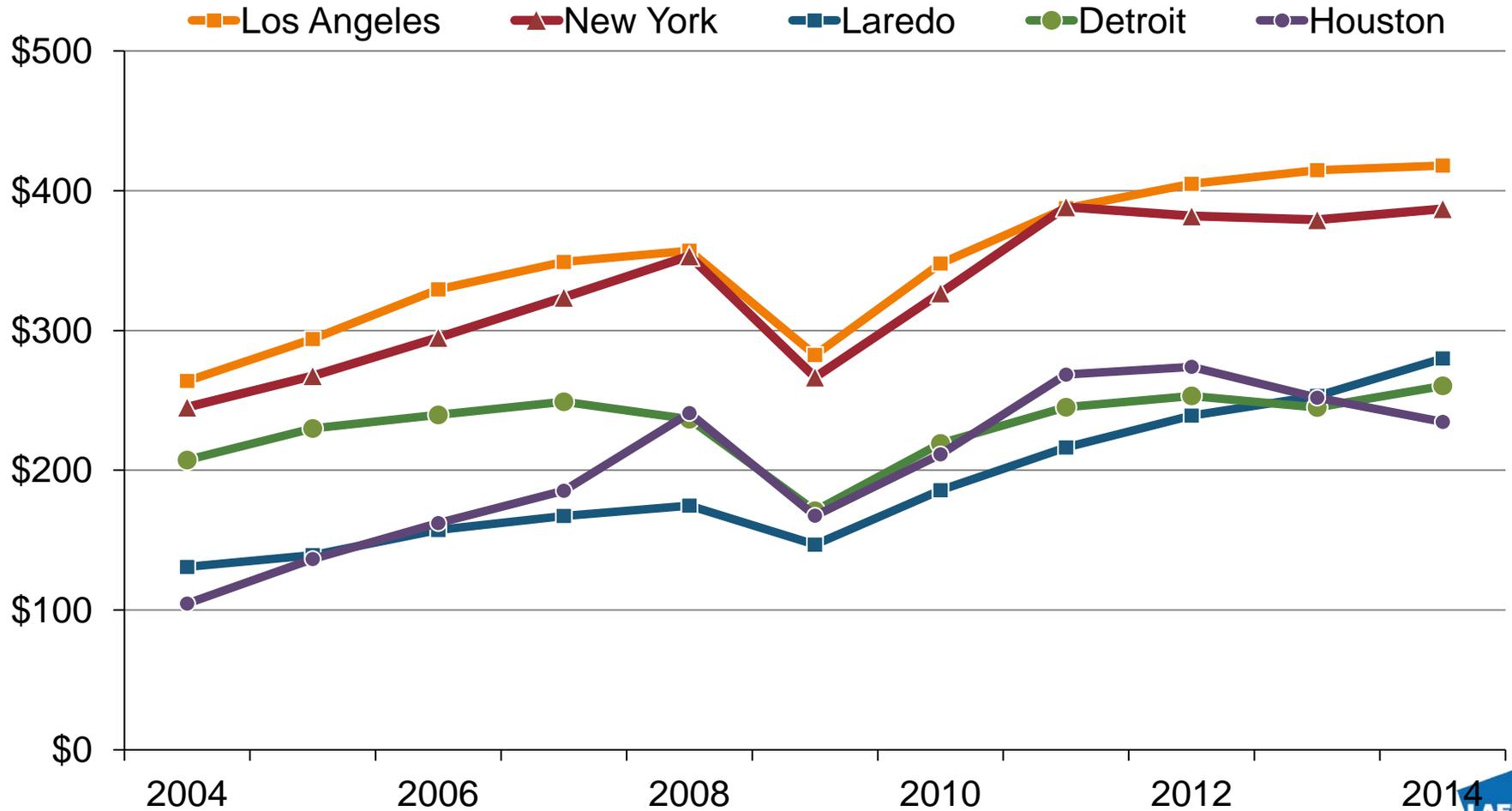
Employment,
thousands



Value of International Trade

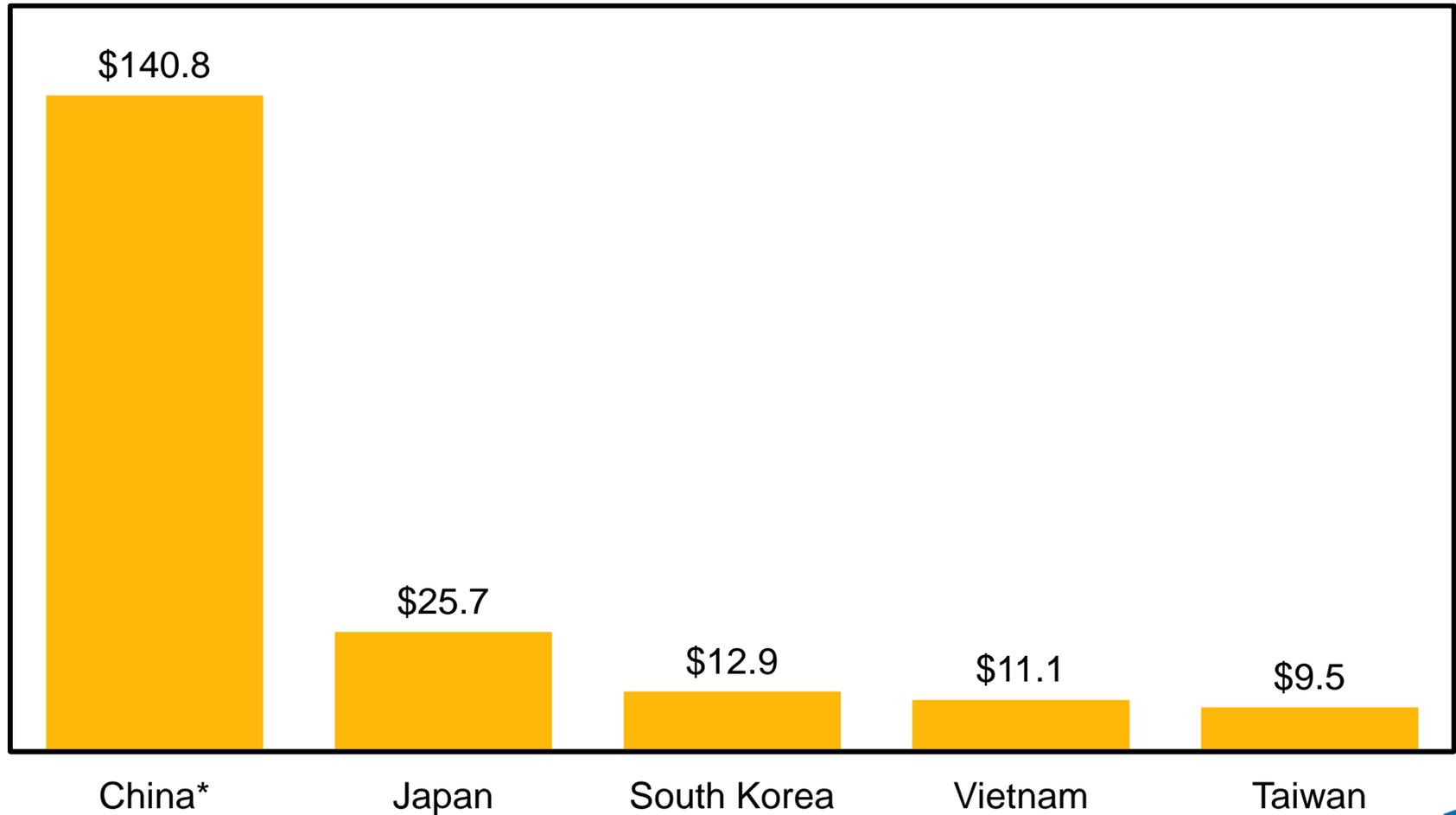
at Nation's Leading Customs Districts

Billions USD



LACD Top 5 Import Sources, 2014

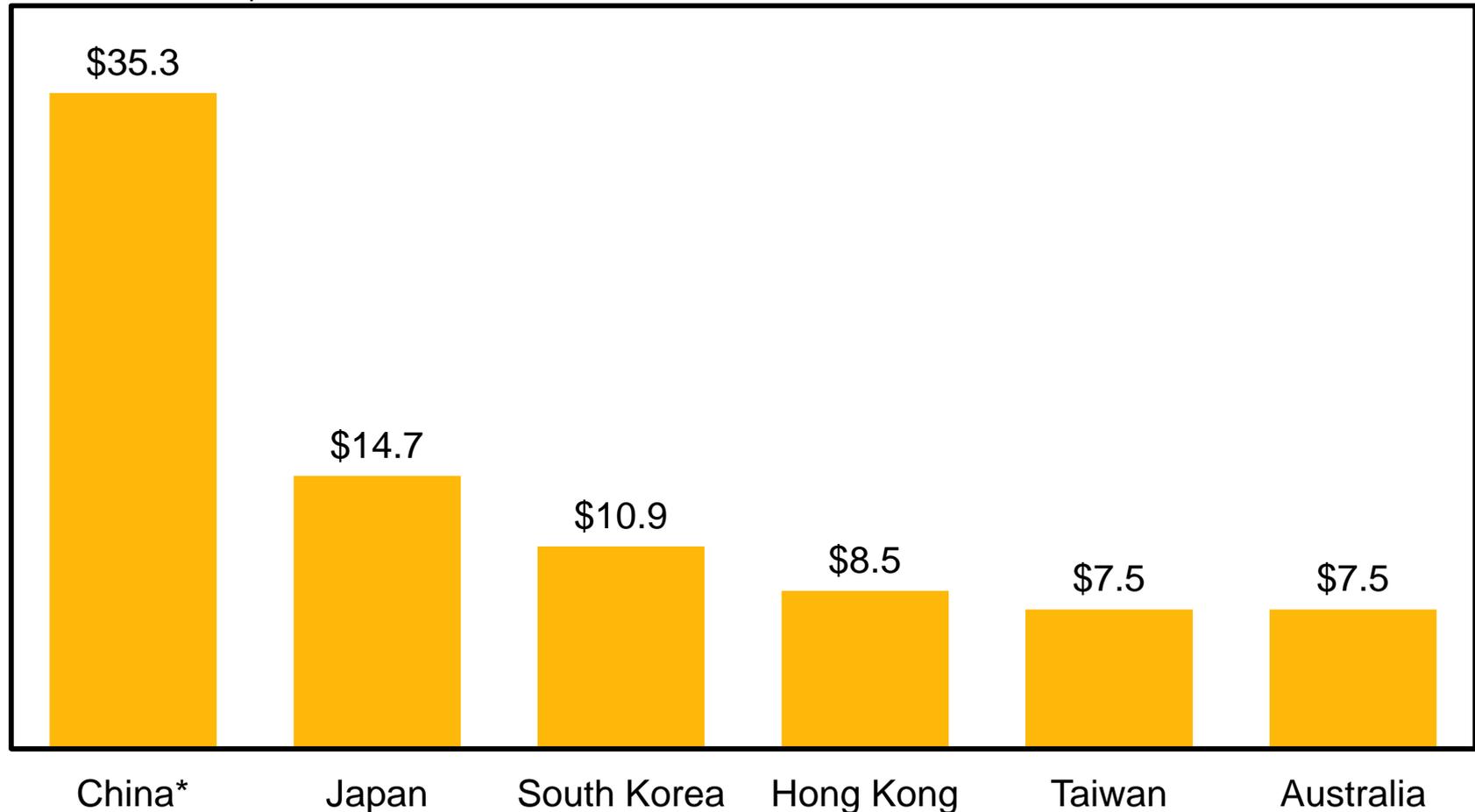
Billions of U.S.\$



Source: USA Trade Online – *China includes Hong Kong

LACD Top 5 Export Destinations, 2014

Billions of U.S.\$



Source: USA Trade Online -- *China includes Hong Kong



LACD Top Imports

Ranked by Value, 2014

- Computers & Electronics (Computers and Semiconductors)
- Transportation Equipment (Autos and Auto Parts)
- Apparel (Women's Clothing)
- Miscellaneous Manufacturing (Toys, Jewelry and Medical Equipment)
- Electrical Equipment (Appliances)

LACD Top Exports

Ranked by Value, 2014

- Computers & Electronics (Measuring Instruments and Semiconductors)
- Transportation Equipment (Aerospace Products – Aircraft Engines and Parts)
- Chemicals (Organic & Inorganic and Resins)
- Machinery (Ag & Construction related and Pumps)
- Food (Meat – Frozen Beef)

Conclusion



Challenges & Opportunities

CHALLENGES

- Port Competition
- Freeway Congestion
- Limited Industrial Space
- Labor-Automation Tradeoff
- Port-Related Pollution

OPPORTUNITIES

- Big Ship Ready, Efficient
- Alameda Corridor
- Think Regional – IE
- Answer?
- Global Leaders in Adoption of Pollution Mitigation Efforts & Technology
- Growth of Trade – US & Global!!!

THANK YOU!



Appendix



Los Angeles County - Gateway to America's Largest Consumer Market

Los Angeles Metropolitan Area

- Los Angeles County*
- Orange County
- Riverside County
- San Bernardino County
- Ventura County

Population: 18.06 Million

California

Population: 37.7 Million



Southern California

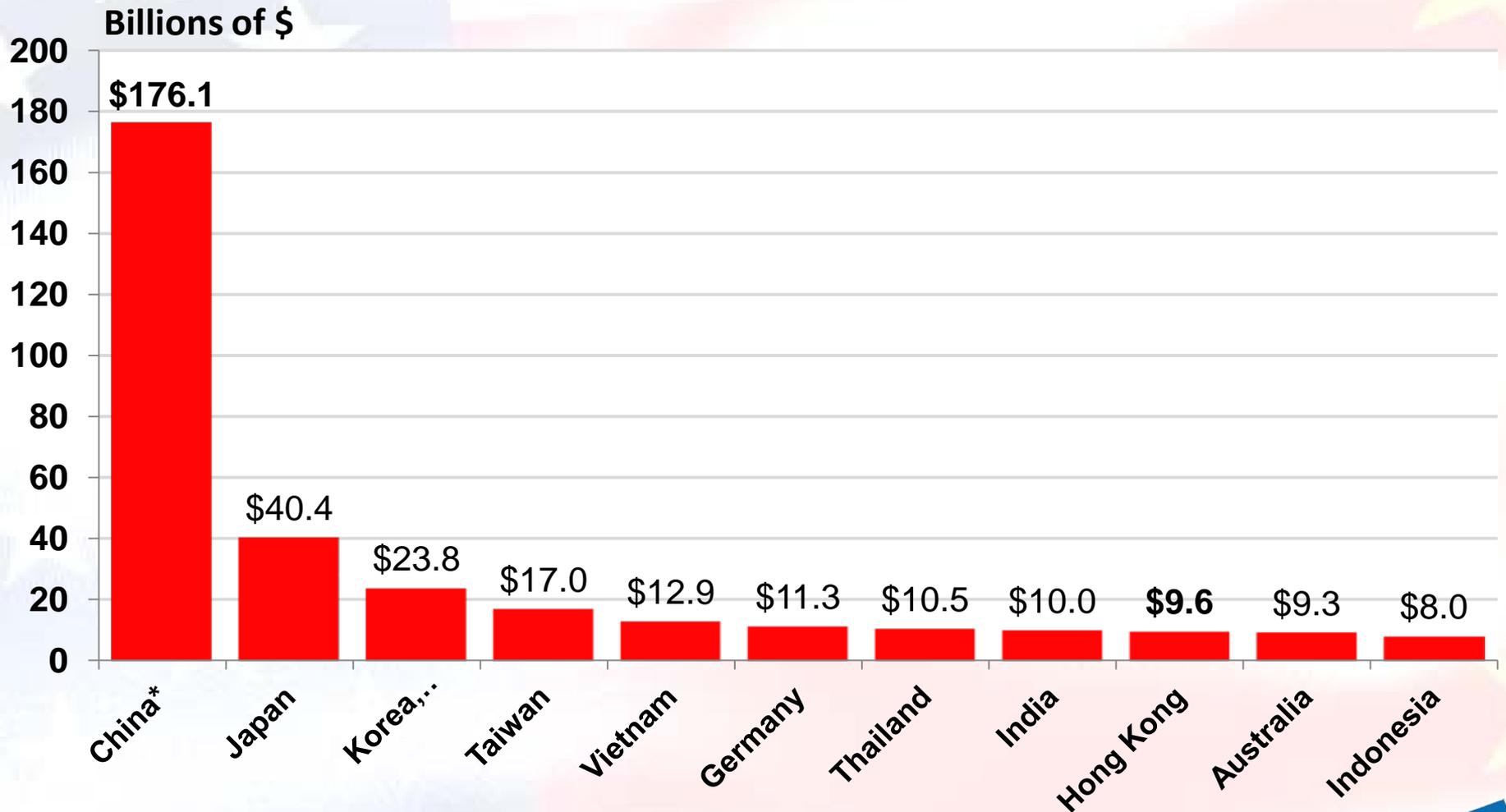
Los Angeles Metro Area
+
San Diego County

Population: 21.2 Million

*** If LA County were a state, it would be larger than 43 other states in US.**



2014 LACD Top Trading Partners



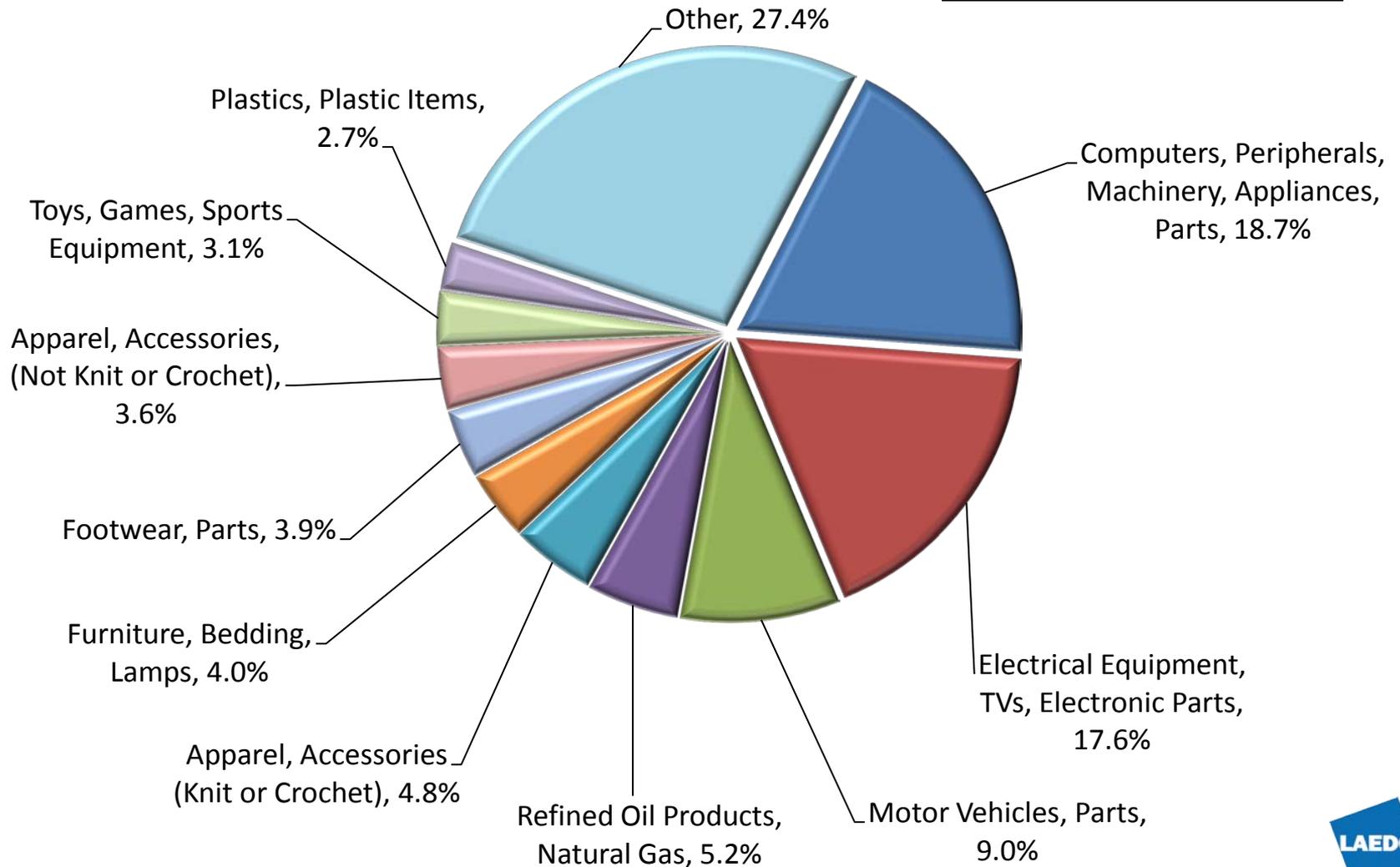
*China includes the Mainland, Hong Kong and Macau

Source: USA Trade Online

2014 Imports Entering the L.A.C.D.

(Share of Total)

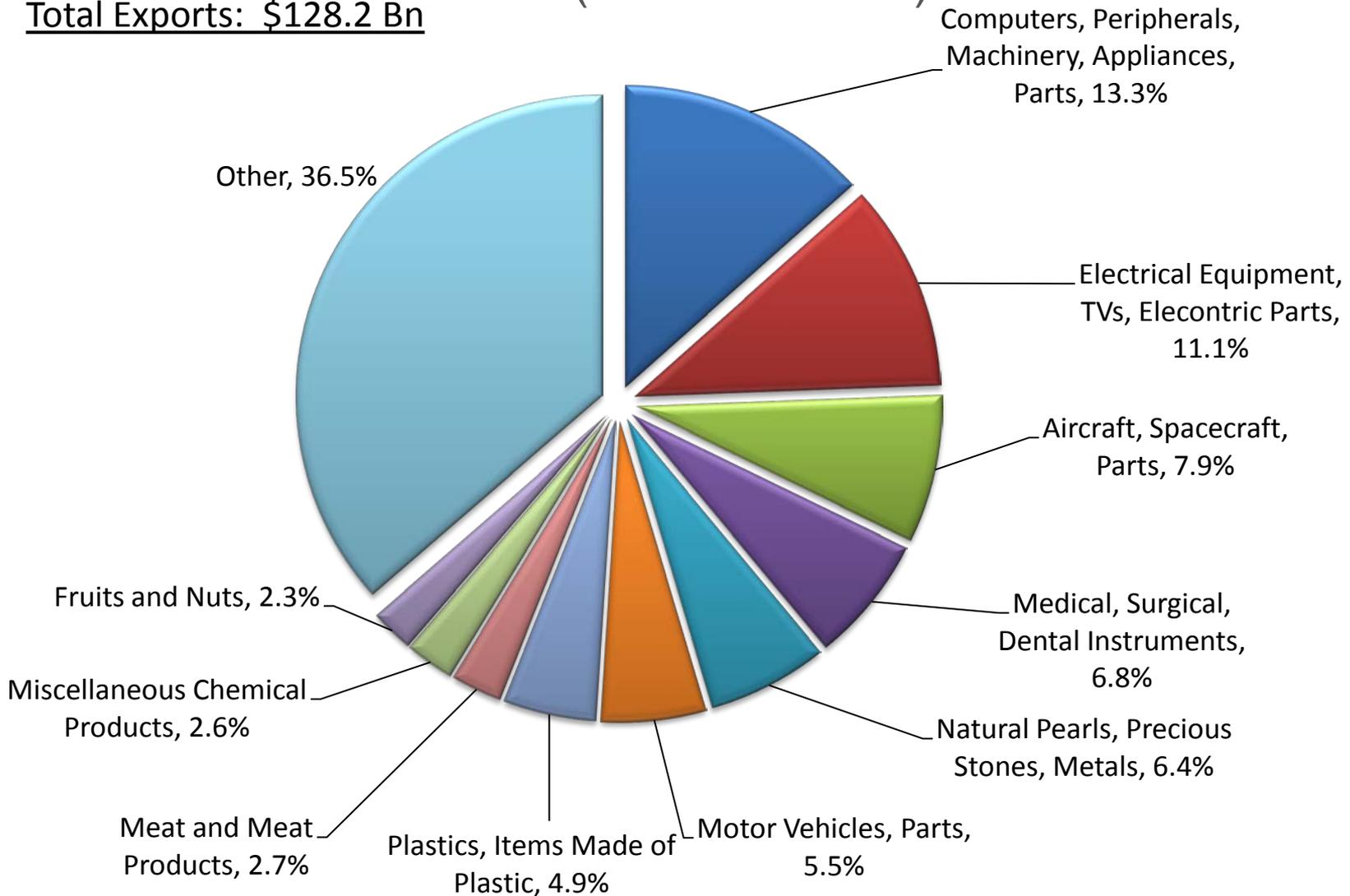
Total Imports: \$379.8 Bn



2014 Exports Through The L.A.C.D.

(Share of Total)

Total Exports: \$128.2 Bn



Los Angeles Metro Area Exports

Ranked by Value, 2012

- Transportation equipment (aircraft products/parts)
- Royalties (from film and music)
- Petroleum Products
- Precision Instruments
- Semiconductors