

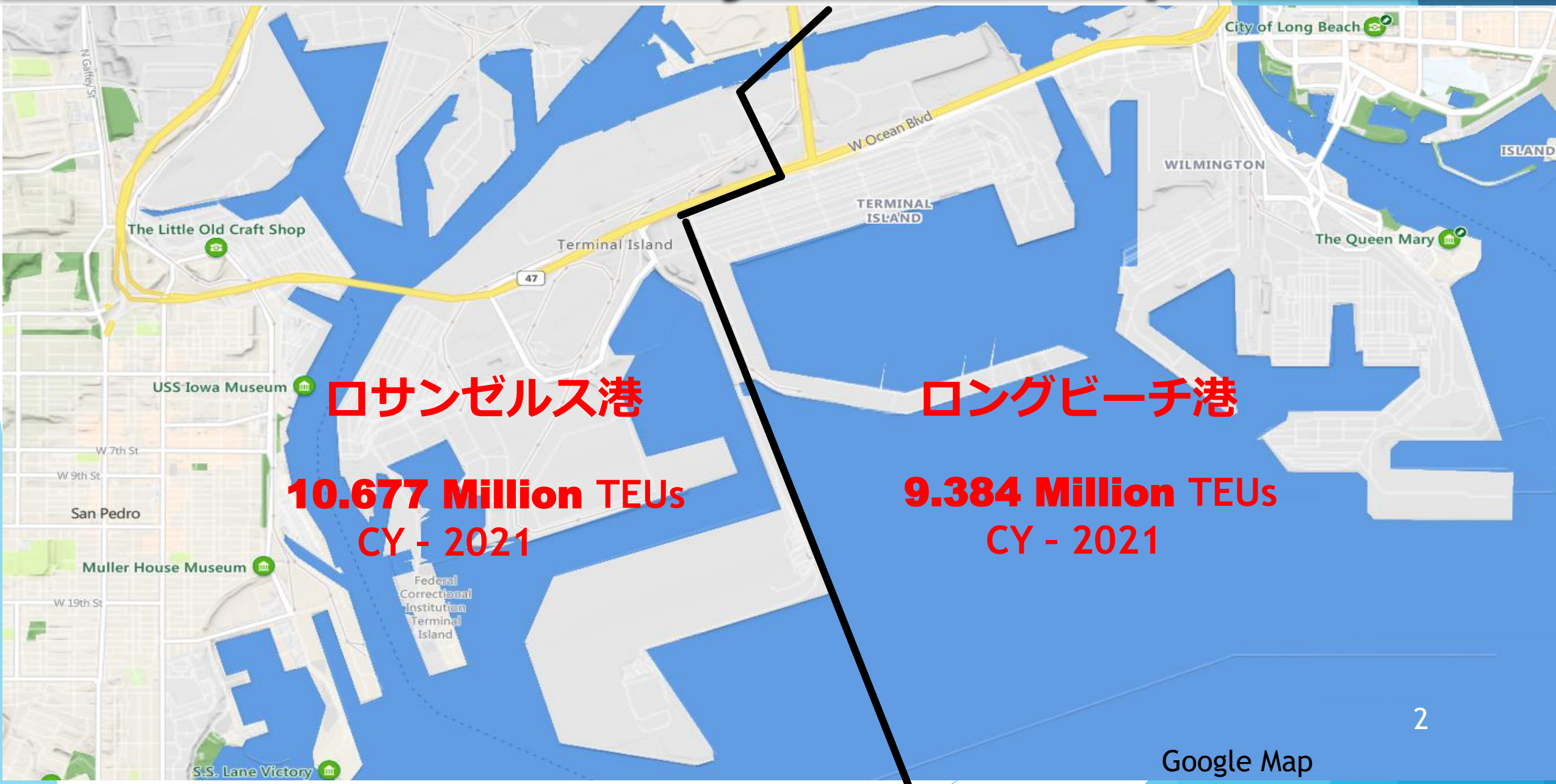
「米国西海岸の港湾の最新動向」 (ジェットロ主催セミナー) ～ San Pedro Bay Ports (LA/LB) update ～

Masashi Morimoto
March 30, 2022



出所 : Port of Los Angeles

San Pedro Bay Ports Complex



世界のコンテナ取扱量上位10港（2021年）

Ranking	Name of Port	Million TEU
1	Port of Shanghai	47
2	Singapore	37.47
3	Ningbo	31.08
4	Shenzhen	28.76
5	Guangzhou	24.18
6	Qingdao	23.7
7	Busan	22.69
8	Tianjin	20.26
9	LA/LB	20.06
10	Hong Kong	17.79

Port of Shanghai

Singapore

Ningbo

Shenzhen

Guangzhou

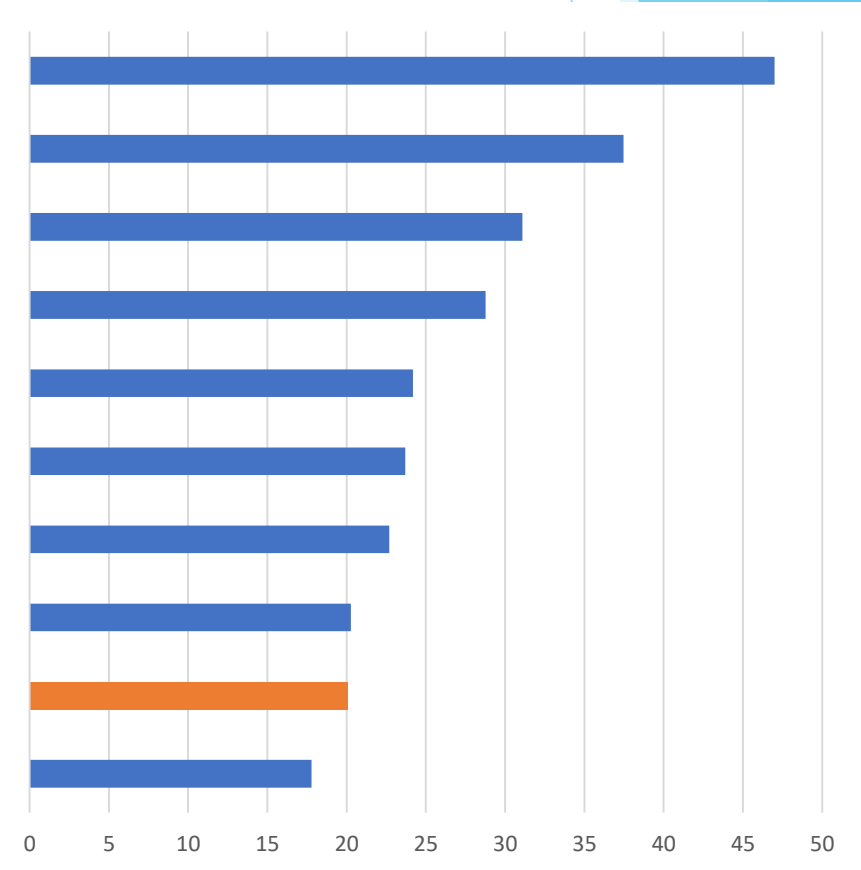
Qingdao

Busan

Tianjin

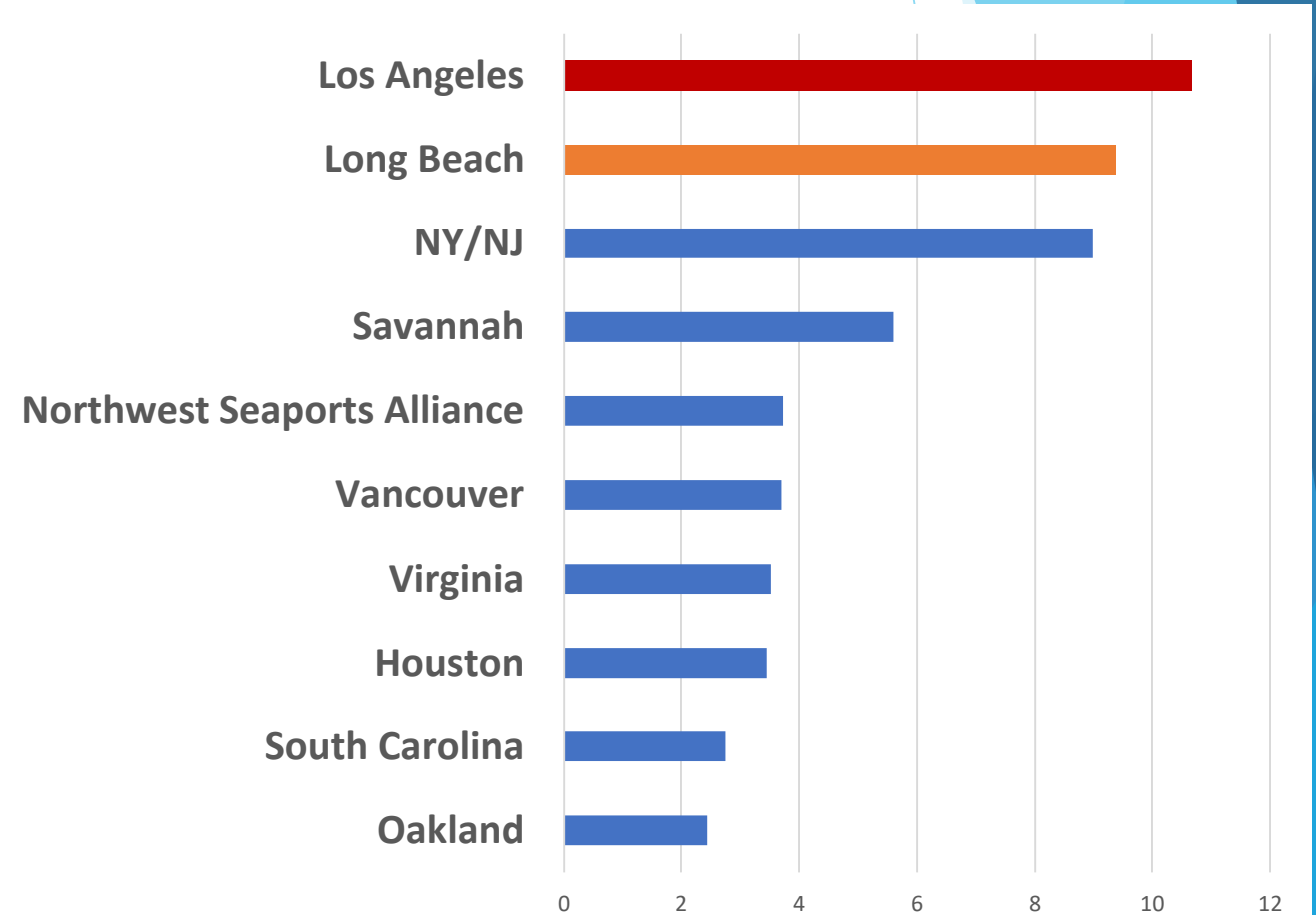
LA/LB

Hong Kong



北米のコンテナ取扱量上位10港（2021年）

Ranking	Name of Port	Million TEU
1	Los Angeles	10.67
2	Long Beach	9.38
3	NY/NJ	8.98
4	Savannah	5.6
5	Northwest Seaports Alliance	3.73
6	Vancouver	3.7
7	Virginia	3.52
8	Houston	3.45
9	South Carolina	2.75
10	Oakland	2.44



出所: 「各港のウェブサイトより」

ロサンゼルス港の主な取扱品目と相手国（2021年）

	Items / Country	
Top Five Containerized Imports (TEUS)	Furniture	(766,066)
	Auto Parts	(378,825)
	Apparel	(306,093)
	Plastics	(281,252)
	Footwear	(231,176)
Top Five Containerized Exports (TEUS)	Pet/Animal Feed	(211,353)
	Paper/Wastepaper	(135,402)
	Soybeans	(86,007)
	Fabrics/raw cotton	(57,675)
	Scrap Metal	(52,674)
Top Five Trading Partners (Cargo Value)	China/Hong Kong	(\$132 Billion)
	Japan	(\$37 Billion)
	Vietnam	(\$28 billion)
	Taiwan	(\$18 billion)
	South Korea	(\$16 billion)

出所: Port of Los Angeles

アジア 18 ヶ国・地域から米国の荷動き量

- 2021年
- 2120.6 万 TEU
- 前年同期比 +15.3%

米国東岸、西岸、メキシコ湾のマーケットシェア

	2022年(1.2月)	2021年	2005年
➤ 西岸 :	≒ 58%	60%	77.5%
➤ 東岸 :	≒ 34.7%	33.6%	21.4%
➤ Gulf :	≒ 6.8%	6.1%	0.7%

米国西岸の港湾における 輸入コンテナのマーケットシェア（2022年2月）

- ▶ Los Angeles 40%
- ▶ Long Beach 37%
- ▶ Northwest Seaport Alliance 13%
- ▶ Oakland 9%

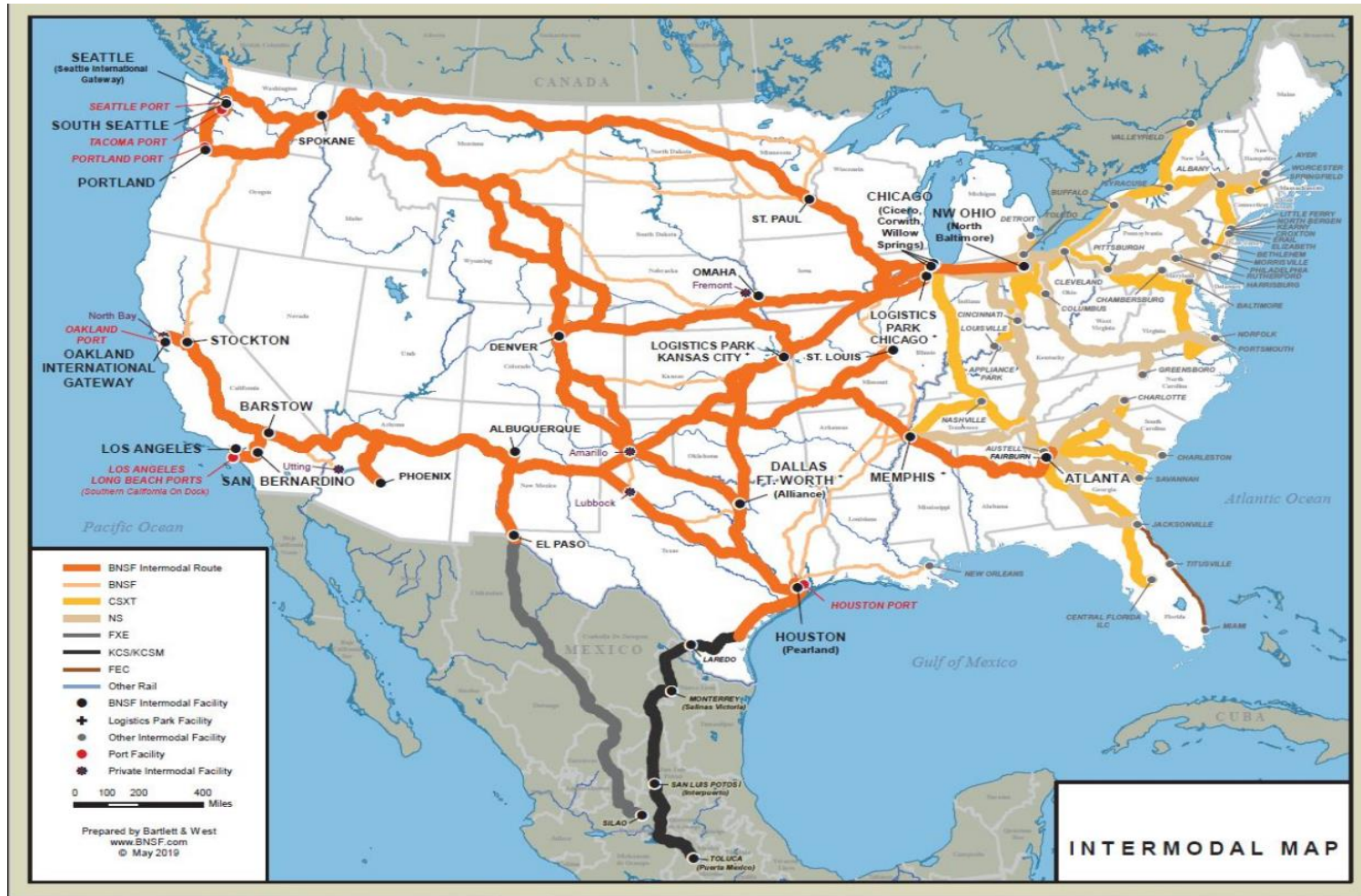
北米の主なコンテナポートと内陸鉄道基地



トラック輸送の経済ライン

出所 :

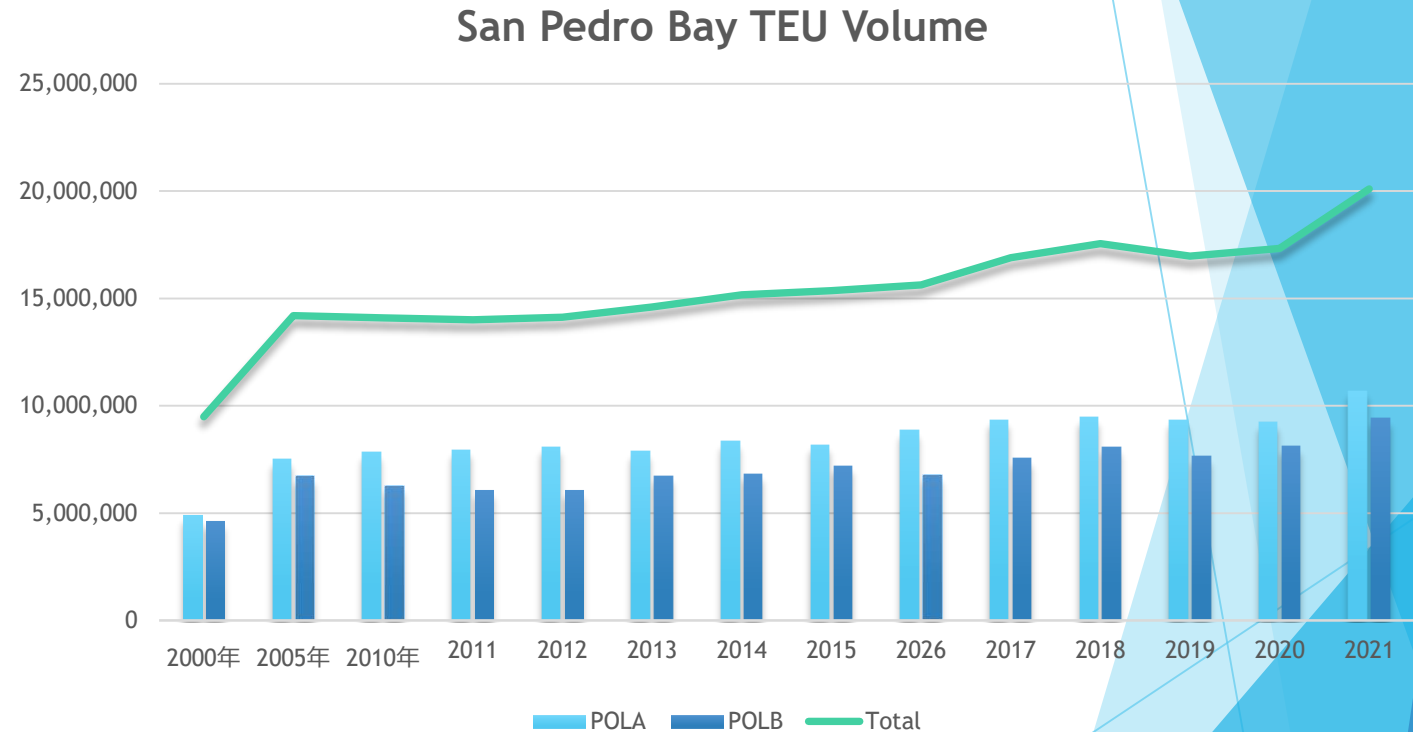
BNSFの鉄道サービス網と主なインターモダルポイント



2000-2021 San Pedro Bay TEU Volume

200-20021年 サンペドロ港 (POLA/POLB) コンテナ 取扱量推移

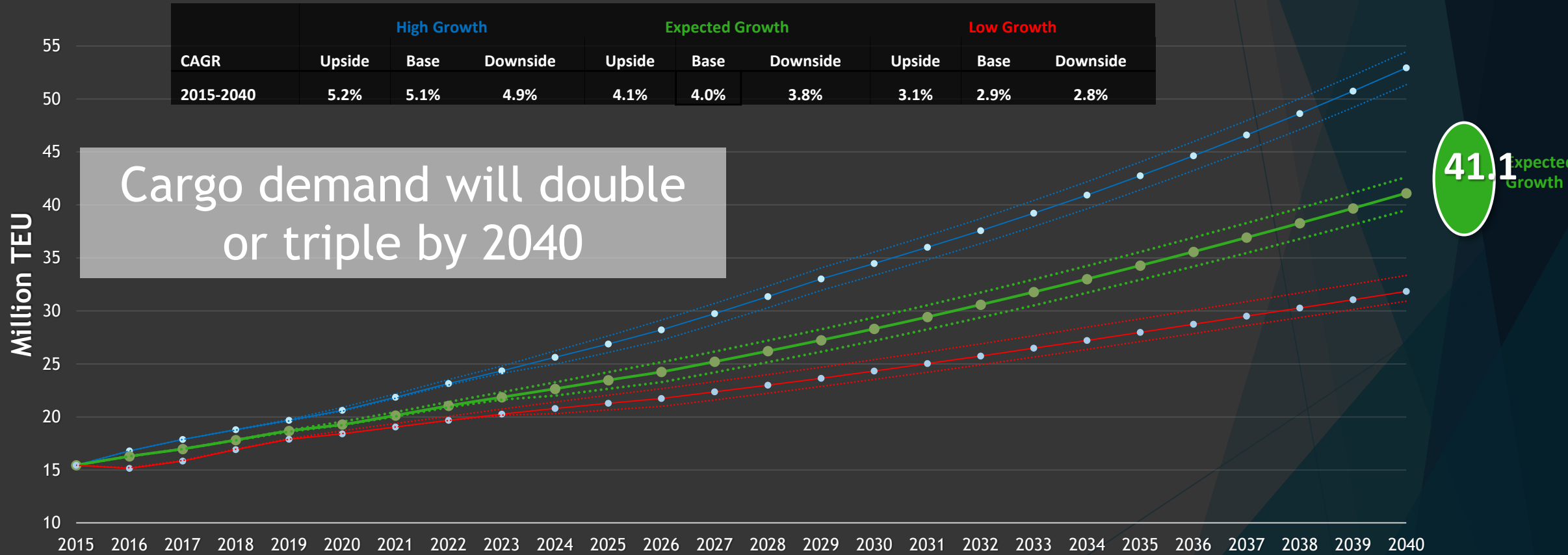
	POLA	POLB	Total
2000	4,879,428	4600652	9,480,080
2005	7,484,624	6709816	14,194,440
2010	7,831,902	6263498	14,095,400
2011	7,940,510	6061102	15,801,612
2012	8,077,714	6045663	14,123,377
2013	7,868,582	6730573	14,599,155
2014	8,340,065	6820807	15,160,872
2015	8,160,457	7192069	15,352,526
2026	8,856,782	6775171	15,631,953
2017	9,343,192	7544507	16,887,699
2018	9,458,748	8091023	17,549,771
2019	9,337,632	7632032	16,969,664
2020	9,213,395	8113315	17,326,710
2021	10,700,000	9400000	20,100,000



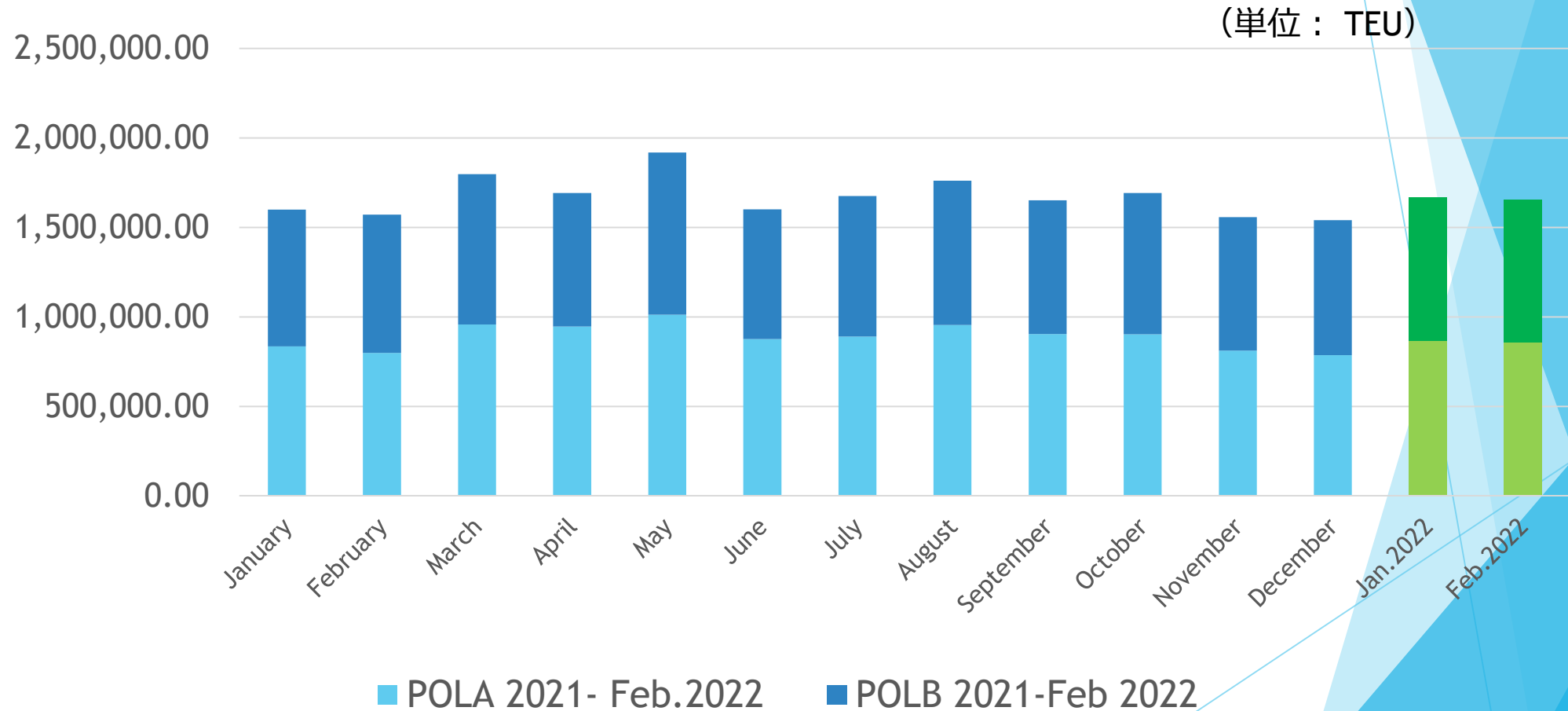
出所: Port of Los Angeles

サンペドロ港のコンテナ取扱量の推移

2021年までの扱い高は長期予測通り



LA港とLB港のコンテナ取扱量 (2021年1月~2022年2月)



出所: Port of Los Angeles, Long Beach

LA港とLB港のコンテナ取扱量（2022年1月～2月）

Port of Long Beach

Month	Loaded Imports	Empty Imports	Total Imports	Loaded Exports	Empty Exports	Total Exports	Total TEUs	Prior Year Change
January	389,334	12,492	401,826	123,060	276,058	399,118	800,943	+4.8%
February	390,335	11,617	401,952	117,935	276,673	394,608	796,560	+3.2%
Total	779,669	14,109	803,778	240,995	552,731	793,726	1,597,503	+4.0%

Port of Los Angeles

Month	Loaded Imports	Empty Imports	Total Imports	Loaded Exports	Empty Exports	Total Exports	Total TEUs	Prior Year Change
January	427,207.70	1266.55	428,474.25	100,185.25	336,935.85	437,121.10	865,595.35	+3.60%
February	424,072.85	2739.60	426,812.45	95,441.00	335,510.95	430,951.95	857,764.40	+7.31%
Total	851,280.55	4006.15	855,286.70	195,626.25	672,446.80	868,073.05	1,723,359.75	+5.42%

PORT OF L.A. OPERATIONS REPORT (Tuesday, March 29, 2022)



Vessels in Port (POLA)

17 containers, 3 tankers/ATB, 0 General/Bulk, 0 vehicle, 2 cruise, 0 reefer

Container Vessel Update

(A) Vessels within 40 NM heading to San Pedro Bay: 2 (0% over 10k TEUs) (POLA: 2; POLB: 0)
 (B) Vessels that are loitering/driftng/slow steaming heading to San Pedro Bay: 40 (53% over 10k TEUs) (POLA: 24; POLB: 16)
 Total A + B (from above) heading to San Pedro Bay: 42* (50% over 10k TEUs) (POLA: 26 approx. 255,000 TEU; POLB: 16)
 POLA bound vessels average days awaiting berth within 40 NM – 1 day

Terminal Update

POLA: 42 vessel gangs working; 15 gangs cut
 POLA Dwell time on terminal last 30 days (As of Mar 29): Local – 4.9 days **N/C** (11 days peak)
 POLA Dwell On-dock rail last 30 days (As of Mar 29): 4.9 days (13.4 peak)
 Containers/chassis off terminal (As of Mar 29- per POP website) (40'): 8.3 days **N/C** (11 days peak)
 All POLA terminals On-dock rail waiting to load (As of Mar 29): 14,427 total
 POLA import containers on terminal (As of 08:00 Mar 29): 63,730 17.5% ** ; 15,708 nine days and over 9% **
 Empty containers on POLA terminal and off-dock POLA depots (As of 08:00 Mar 29): 53,575 6% **

N/C = No change from previous day

Arrow direction = change from previous day/reporting period

* November 16, 2021 there were 89 container vessels at anchor/driftng (POLA: 43; POLB: 45)

** Percentage change from previous day

輸入コンテナの取扱い見込み



SIGNAL

powered by Wabtec
Port Optimizer™



Tuesday, March 29, 2022

Mar 27 – Apr 02
(Week 13)

Import Volumes (TEU)

143,026

% Change from
previous week: ▲ 6.90

% Change from
Previous Year: ▲ 33.23

Number of Vessel Calls

27

Apr 03 – Apr 09
(Week 14)

Import Volumes (TEU)

104,728

% Change from
previous week: ▼ 26.78

% Change from
Previous Year: ▼ 9.61

Number of Vessel Calls

21

Apr 10 – Apr 16
(Week 15)

Import Volumes (TEU)

133,354

% Change from
previous week: ▲ 27.33

% Change from
Previous Year: ▲ 5.76

Number of Vessel Calls

26

Inbound Vessels

Total Vessels Due to Port of LA: 25

Average Time Awaiting Berth: 3.2 Days

(Based on last 30-day rolling average)

Vessels Inside 40 NM:

Vessel Name	TEU Capacity	CTA Date	Expected Date of Berth	Terminal	Days Since Arrival	Location
MAERSK ENSENADA	13092	2022-03-04	2022-03-29	APMT	25	Anchorage - F9
MSC TAMPICO	5041	2022-03-10	2022-03-29	WBCT	19	Anchorage - Loiter-S

Vessels Outside 150 NM:

Vessel Name	TEU Capacity	CTA Date	Expected Date of Berth	Terminal	Days Since Arrival	Location
AS SERAFINA	1713	2022-03-24	2022-03-28	YTI	5	Outside 150nm
BALAO	2542	2022-03-26	2022-04-02	YTI	3	Outside 150nm
CMA CGM CALLISTO	11356	2022-03-26	2022-04-12	FMS	3	Outside 150nm
CMA CGM CORTE REAL	13344	2022-03-11	2022-03-30	FMS	18	Outside 150nm
CMA CGM INTEGRITY	10000	2022-03-25	2022-04-07	FMS	4	Outside 150nm
CMA CGM JULES VERNE	16022	2022-03-21	2022-04-03	FMS	8	Outside 150nm
CSCL SUMMER	10036	2022-03-23	2022-04-02	WBCT	6	Outside 150nm
EVER FAST	12100	2022-03-26	2022-03-29	APMT	3	Outside 150nm
EVER LUCID	8508	2022-03-18	2022-04-02	APMT	11	Outside 150nm
GERNER MAERSK	9038	2022-03-15	2022-04-05	APMT	14	Outside 150nm
MAERSK ESMERALDES	13092	2022-03-17	2022-04-10	APMT	12	Outside 150nm
MAERSK SEBAROK	6478	2022-03-28	2022-03-29	APMT	1	Outside 150nm
MSC LIVORNO	14000	2022-03-11	2022-04-01	APMT	18	Outside 150nm
NAVIOS DELIGHT	4250	2022-03-21	2022-04-03	APMT	8	Outside 150nm
NAVIOS UNITE	8200	2022-03-12	2022-04-13	WBCT	17	Outside 150nm
ONE HONG KONG	8212	2022-03-25	2022-03-31	YTI	4	Outside 150nm
REN JIAN 10	4298	2022-03-18	2022-04-01	YTI	11	Outside 150nm
REN JIAN 27	4400	2022-03-19	2022-03-31	TraPac	10	Outside 150nm
SFL HAWAII	6845	2022-03-14	2022-04-11	APMT	15	Outside 150nm
SM NINGBO	6622	2022-02-24	2022-03-31	FMS	33	Outside 150nm
YM TARGET	12690	2022-03-22	2022-04-02	TraPac	7	Outside 150nm
YM UNIFORM	8626	2022-03-20	2022-04-12	WBCT	9	Outside 150nm
YM UNIFORMITY	8626	2022-03-14	2022-03-30	WBCT	15	Outside 150nm

Import Containers by Dwell Time

All Port of Los Angeles Terminals



March 29, 2022 6:56 AM

Total Imported Containers

63,730

0-4 Day Import Containers

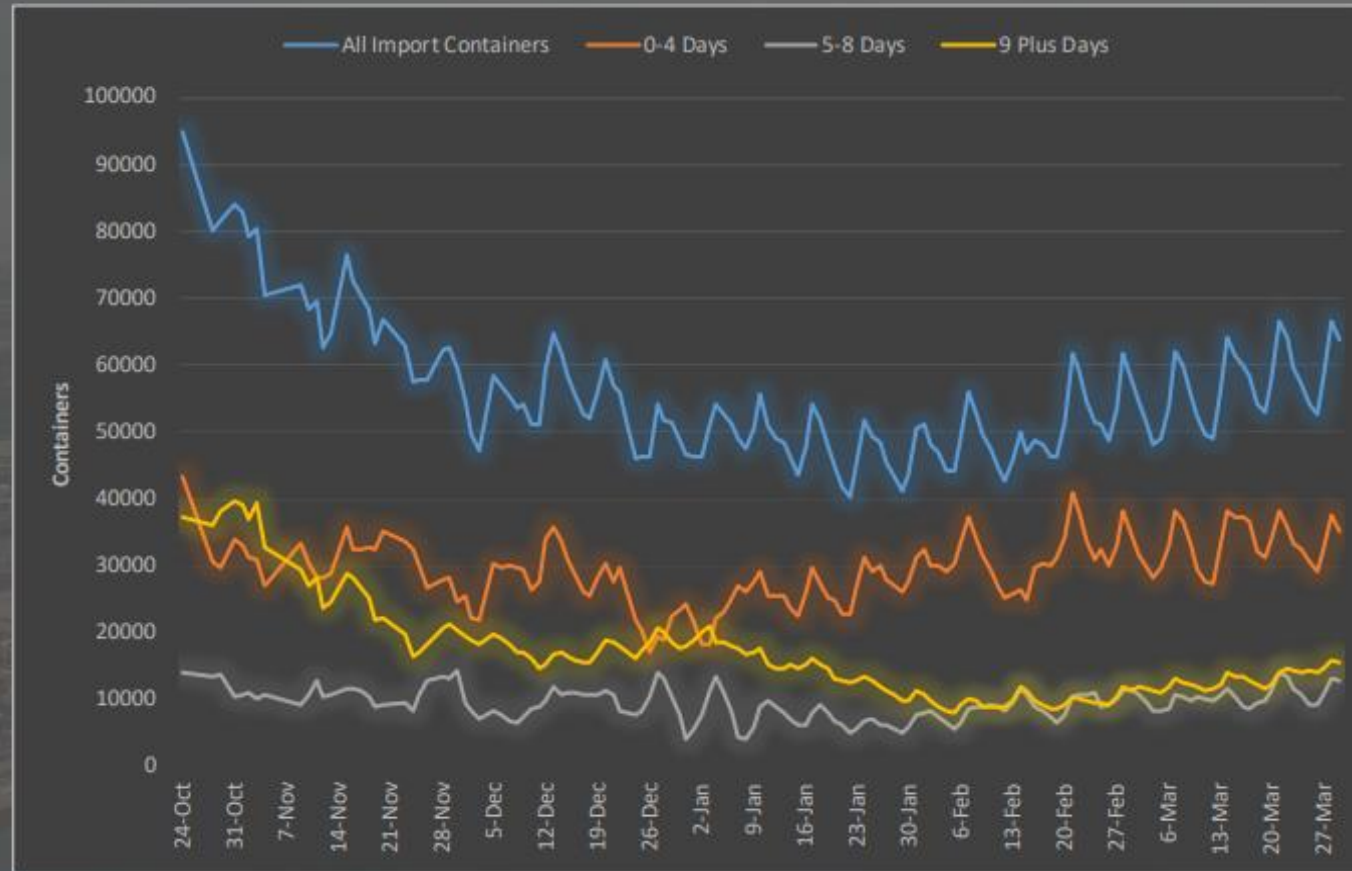
35,100 55.1%

5-8 Day Import Containers

12,922 20.3%

9+ Day Import Containers

15,708 24.6%



Since Oct. 24

Total
-33%

0-4 Day
-19%

5-8 Day
-9%

9+ Day
-58%

Empty Containers

All Port of Los Angeles Terminals



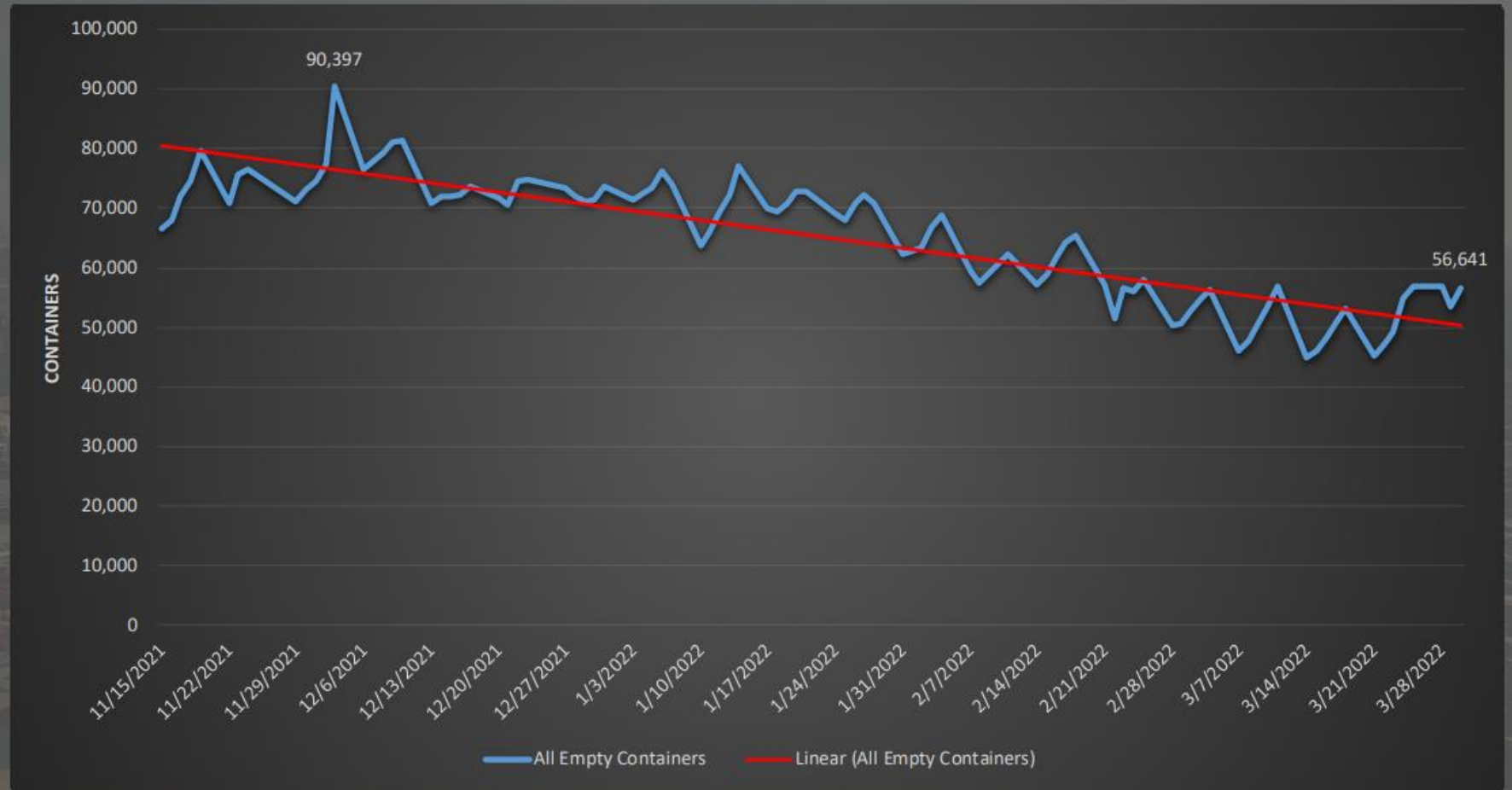
Wednesday, March 30, 2022

Total Empty Containers

56,641

Change Since Nov. 15

-15%



2022年 米国西岸労使交渉


- ▶現在の西岸労使協定は2022年6月30日に終了。
- ▶前回の協定は2014年6月30日に終了し、新しい協定が2015年2月に妥結するまで約8ヶ月を要した。
- ▶この協定は2019年までの5年間とされたが、東海岸の労使交渉(USMX/ILA) 状況や自動化定義の問題で難航が予想されたことや、米国中国間の貿易問題もあり、*PMA/ILWU双方は2017年6月に3年間の延長を決定。
- ▶2018年10月*USMX とILA は労働協約を2018年10月1日より2024年9月30日まで延長

*PMA (太平洋海事協会)、ILWU (国際港湾倉庫労働者組合)

*USMX(米国海洋連合)、ILA(国際港湾労働者協会)

LA/LB 港の現状

今年前半からピークシーズンに向けての懸念材料

* サービスコントラクト交渉の進捗状況 (運賃) 

* ILWU/PMA 労使交渉の推移に注視 (自動化、賃金) 

バイデン政権の早期介入の可能性、
中間選挙、ウクライナ戦争、金利高、インフレ

* コンテナ船と陸上における滞留コンテナ増によるコンテナ不足 

* Covid 蔓延による労働者不足は改善傾向

(港湾労働者、トラックドライバーを含Logistics 全体) 

* 労働コスト上昇 

* コンテナターミナル内の混雑状況

IPI: 

Local: 

4月から5月にかけて新たなピークを迎える可能性。

夏ごろまで全体の状況はそれほど改善しないと考えて準備を

Q & A