

# The Impacts of the Maritime Industry in Washington State

Maritime and Manufacturing Task Force  
Meeting  
September 30, 2014

- 1850** SS Beaver, first steamship in the Pacific Northwest, is commissioned by Hudson's Bay Company
- 1873** Northern Pacific Railroad chooses Tacoma as western terminus of transcontinental line
- 1882** Moran Brothers Company shipbuilders established  
Thea Foss founds Foss Launch Co., later to become Foss Maritime - the largest tug company on the West Coast. Tugboat Annie character based on Ms. Foss.
- 1889** Foss Maritime - the largest tug company on the West Coast. Tugboat Annie character based on Ms. Foss.
- 1891** Puget Sound Naval Shipyard established
- 1911** Port Districts Act of 1911 establishes Washington's Public Ports
- 1916** Todd Shipyards purchases Seattle Construction and Drydock, expanding to Harbor Island in 1917
- 1916-1918** Todd Shipyards operates 24 hrs a day, employing 18,000 workers and supplying nearly 90% of World War I's first convoy; major post-war contraction
- 1918** Columbia River Compact establishes joint management of Columbia River fisheries by OR and WA
- 1920** Merchant Marine Act of 1920 requires U.S. Ports to give preference to U.S.-flagged ships



- 1934** Lake Washington Ship Canal completed
- 1941-1945** Todd Shipyards gears up for WWII, ultimately employing nearly 57,000 nation-wide building 1,000 ships and repairing or converting another 23,000
- 1951** Seattle's first Seafair!
- 1960s** The containerization era of maritime shipping begins; steel overtakes wood in fishing boat construction
- 1974** Boldt Decision reaffirms Tribal salmon-fishing rights  
Magnuson-Stevens Act establishes 200-mile fishery conservation zone off U.S. coast, consolidating control over territorial waters and managing fisheries
- 1976** Magnuson-Stevens Act establishes 200-mile fishery conservation zone off U.S. coast, consolidating control over territorial waters and managing fisheries
- 1991** Alaska fisheries become completely domesticated
- 2005** Marco Shipyards closes Ballard location
- 2011** Vigor Industrial purchases Todd Shipyards for \$130M
- 2012** WA State Ferries announce conversion to natural gas
- 2012** Icicle Seafoods acquires Snopac products
- 2012** Icebreaker Polar Star reactivated after \$57M overhaul at Vigor Industrial Shipyard
- 2013** Foss Maritime divests Columbia River business

## 1850-1900



## 1900-1950



## 1950-2005



## 2005-Present



**1850 - SS Beaver**



**1889 - Foss Maritime**



**1934 - Lk. Wash. Ship Canal**



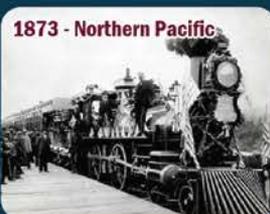
**1960s - Containerization**



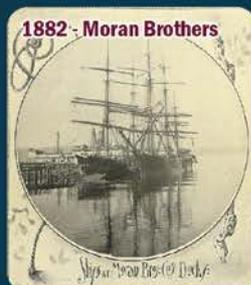
**1976 - Magnuson-Stevens Act**



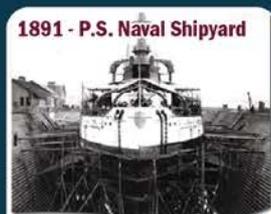
**1873 - Northern Pacific**



**1882 - Moran Brothers**



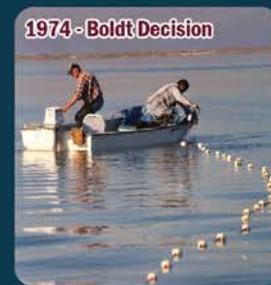
**1891 - P.S. Naval Shipyard**



**1945 - Todd Shipyards**



**1974 - Boldt Decision**



**2011 - Vigor Shipyard**





## MEASURES AND IMPACTS

Jobs

Establishments

Revenues

Secondary Impacts

Fiscal Impacts

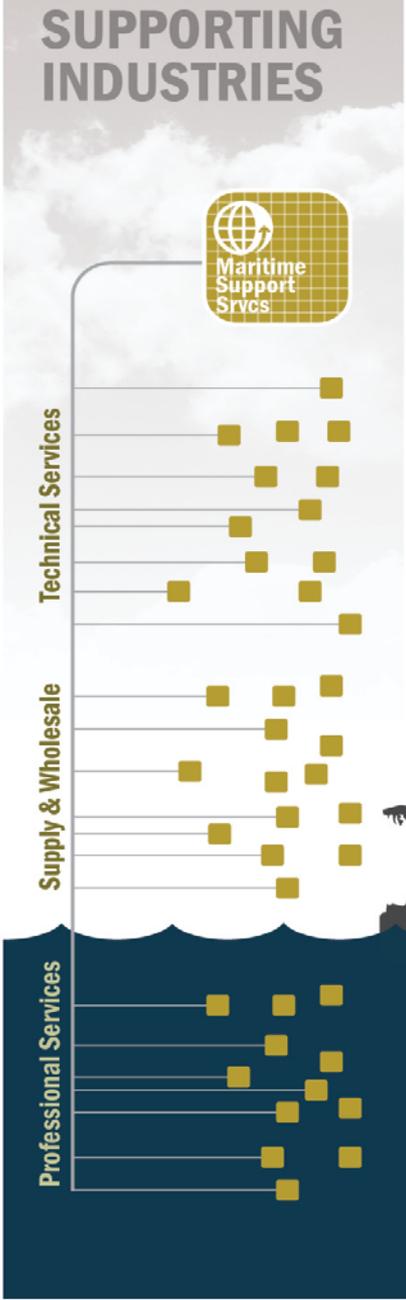
# SUPPORTING INDUSTRIES



Technical Services

Supply & Wholesale

Professional Services



# CORE MARITIME INDUSTRIES

The **COMMERCIAL** segment of the Ship & Boat Building, Maintenance and Repair industry directly supports other core industries of the Maritime Cluster, except for Container & Break Bulk segment of Logistics & Shipping

Ship & Boat Building, Maintenance, Repair: **COMMERCIAL**



Ship & Boat Building, Maintenance, Repair: **COMMERCIAL**

Ship & Boat Building, Maintenance, Repair: **MILITARY**

Ship & Boat Building, Maintenance, Repair: **RECREATIONAL**

Maritime Logistics and Shipping: **CONTAINER & BREAK BULK**

Maritime Logistics and Shipping: **TUG & BARGE**

Passenger Water Transport

Fishing and Seafood Processing

Size of box shapes corresponds to Industry employment.

# WORKFORCE TRAINING



## Institutions

- Technical Colleges
- Community Colleges
- Universities
- Maritime Academies, Schools
- Youth Maritime Training Assoc's
- Non-Profit & Gov't Workforce Org's



## Programs

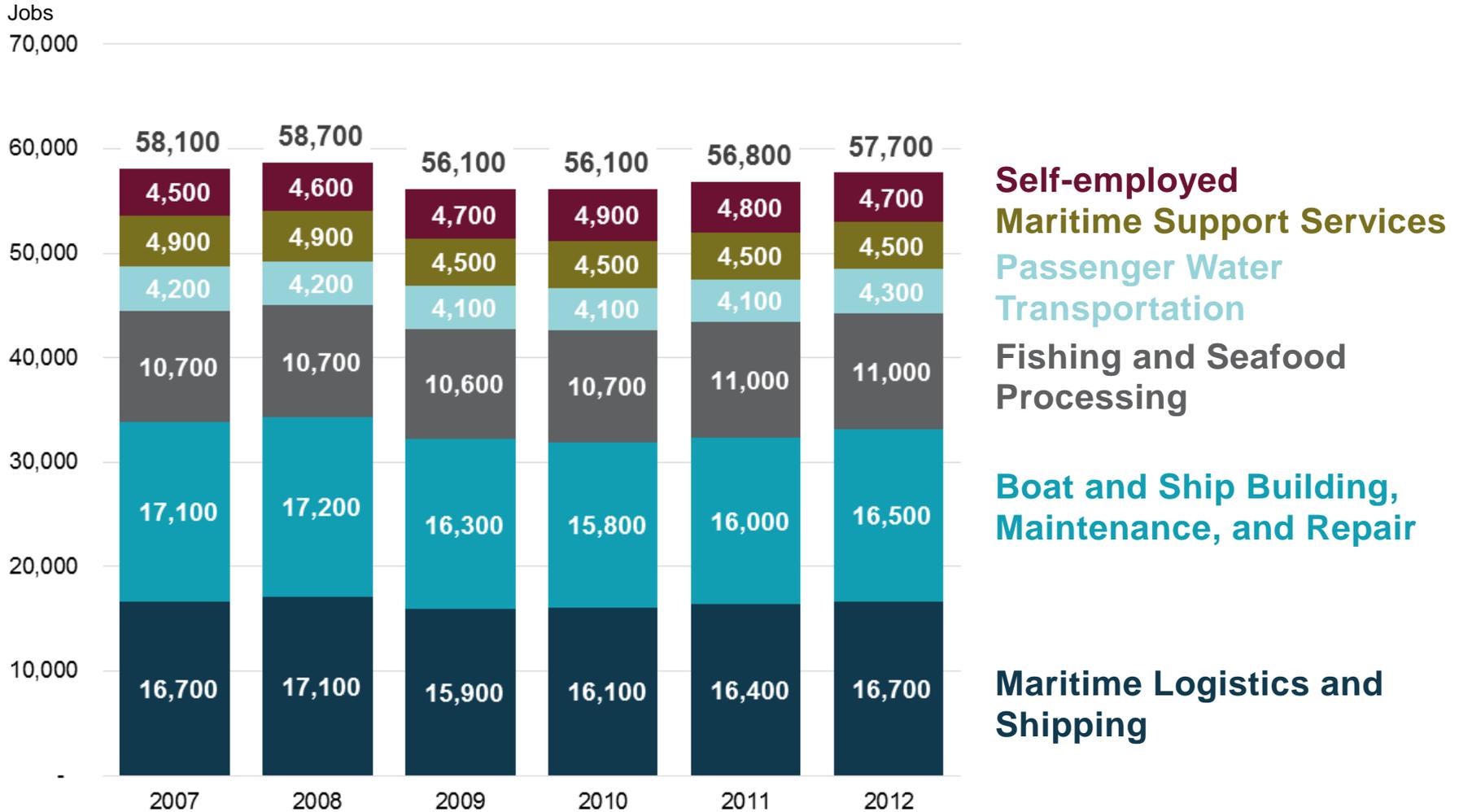
- Boat Building
- Maritime Certification & Licensing
- Maritime Safety
- Marine Mfg. & Technology
- Aquatic & Fishery Science
- General Mfg. & Trades



# WASHINGTON STATE MARITIME IMPACTS: employment

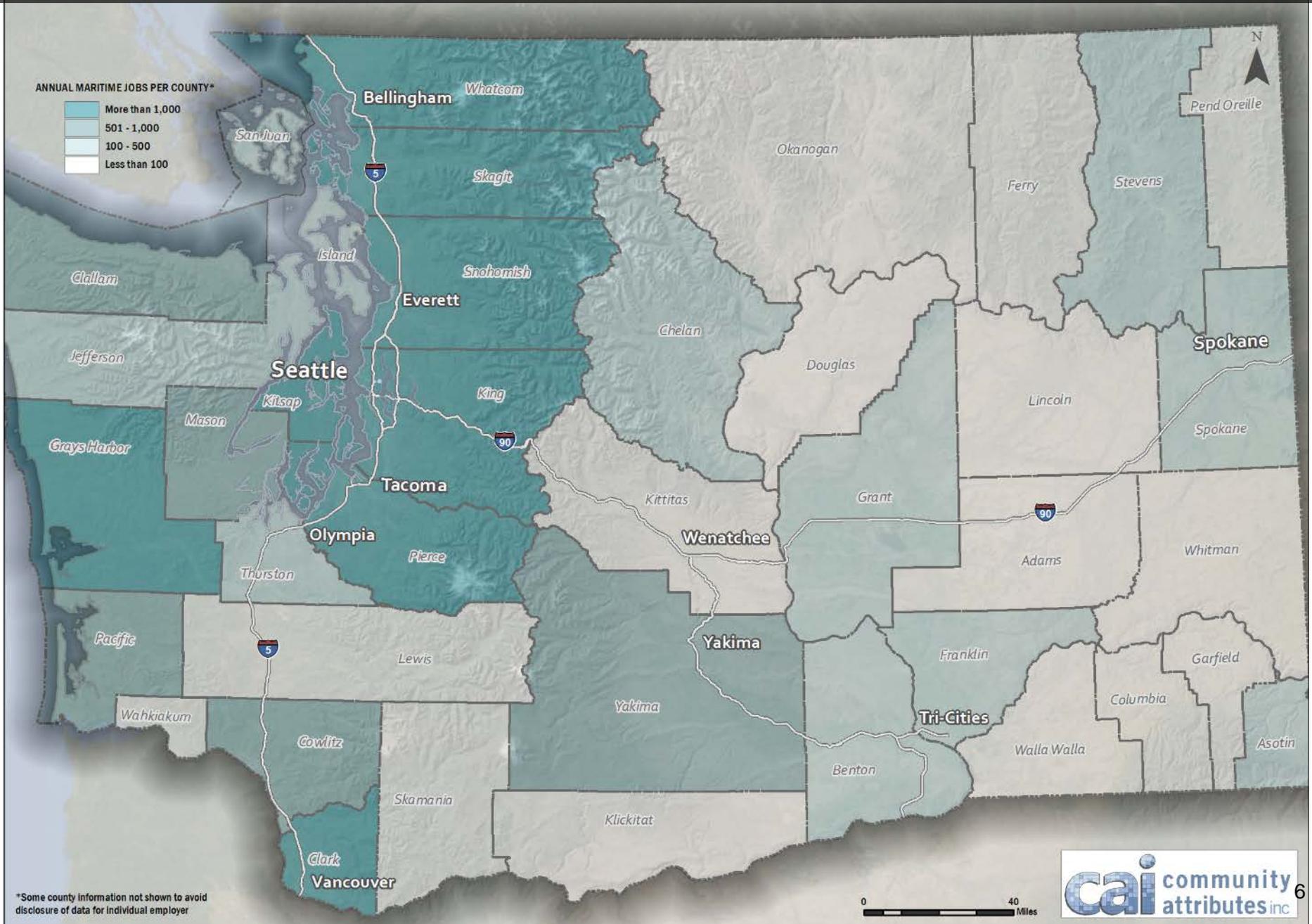
## Washington State Maritime Industry Jobs by Subsector

2007-2012



Sources: Washington State Employment Security Department; Community Attributes Inc.

# WASHINGTON STATE MARITIME IMPACTS: employment



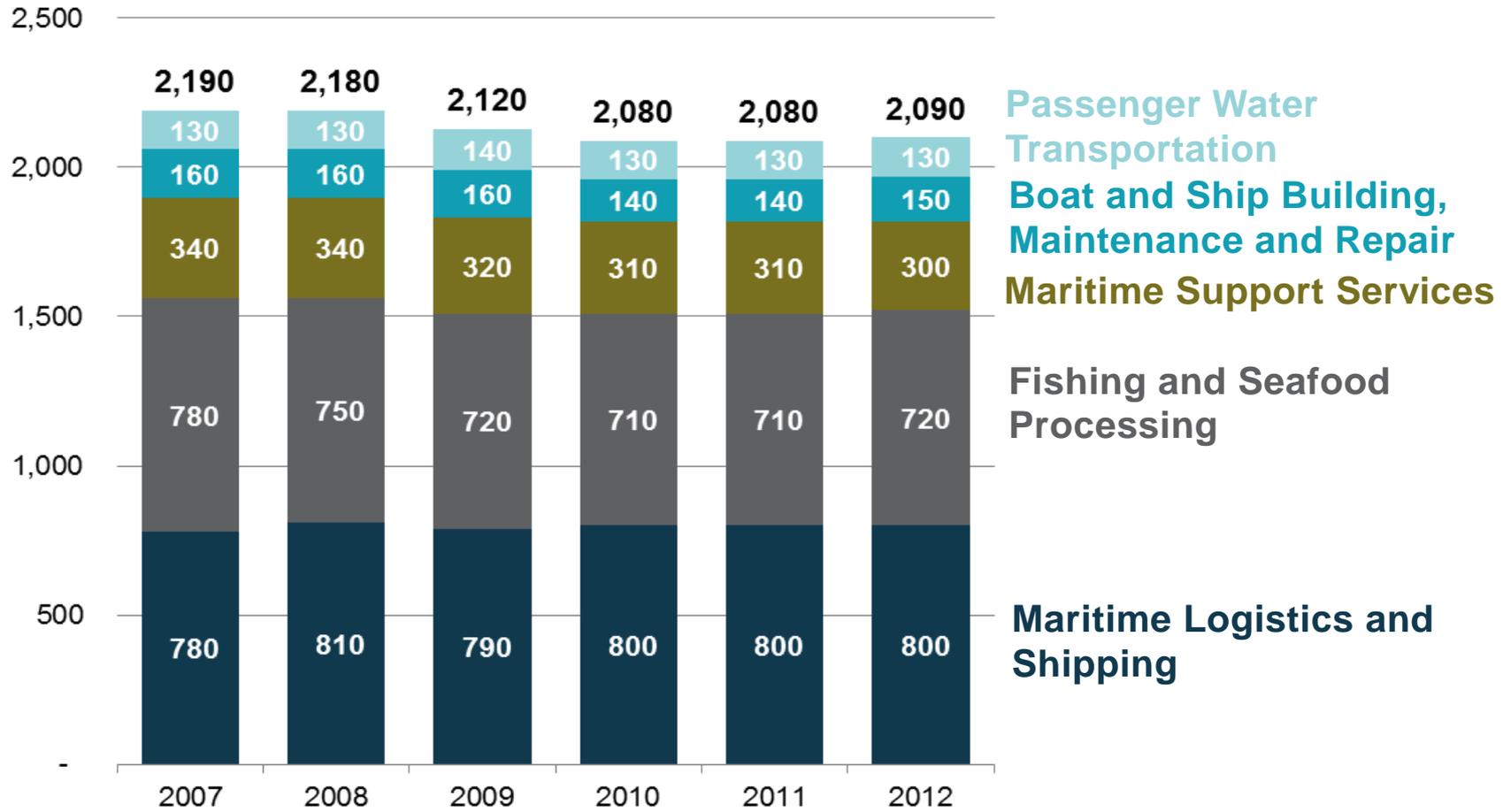
\*Some county information not shown to avoid disclosure of data for individual employer

# WASHINGTON STATE MARITIME IMPACTS: establishments

## Washington State Maritime Industry Establishments

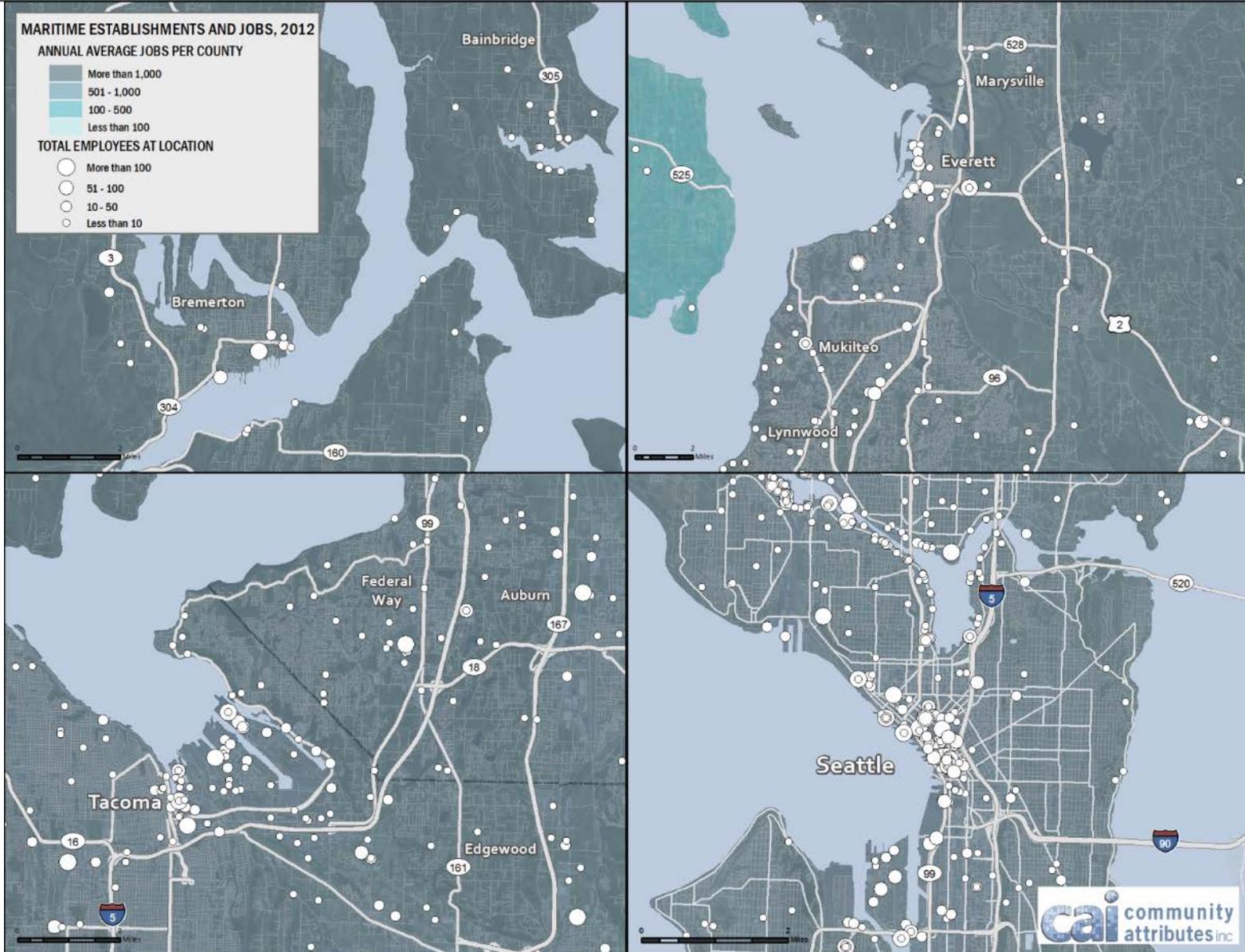
2007 – 2012, Annual

Establishments



Source: Community Attributes Inc.; Washington State Employment Security Department (2013). Excludes sole-proprietors.

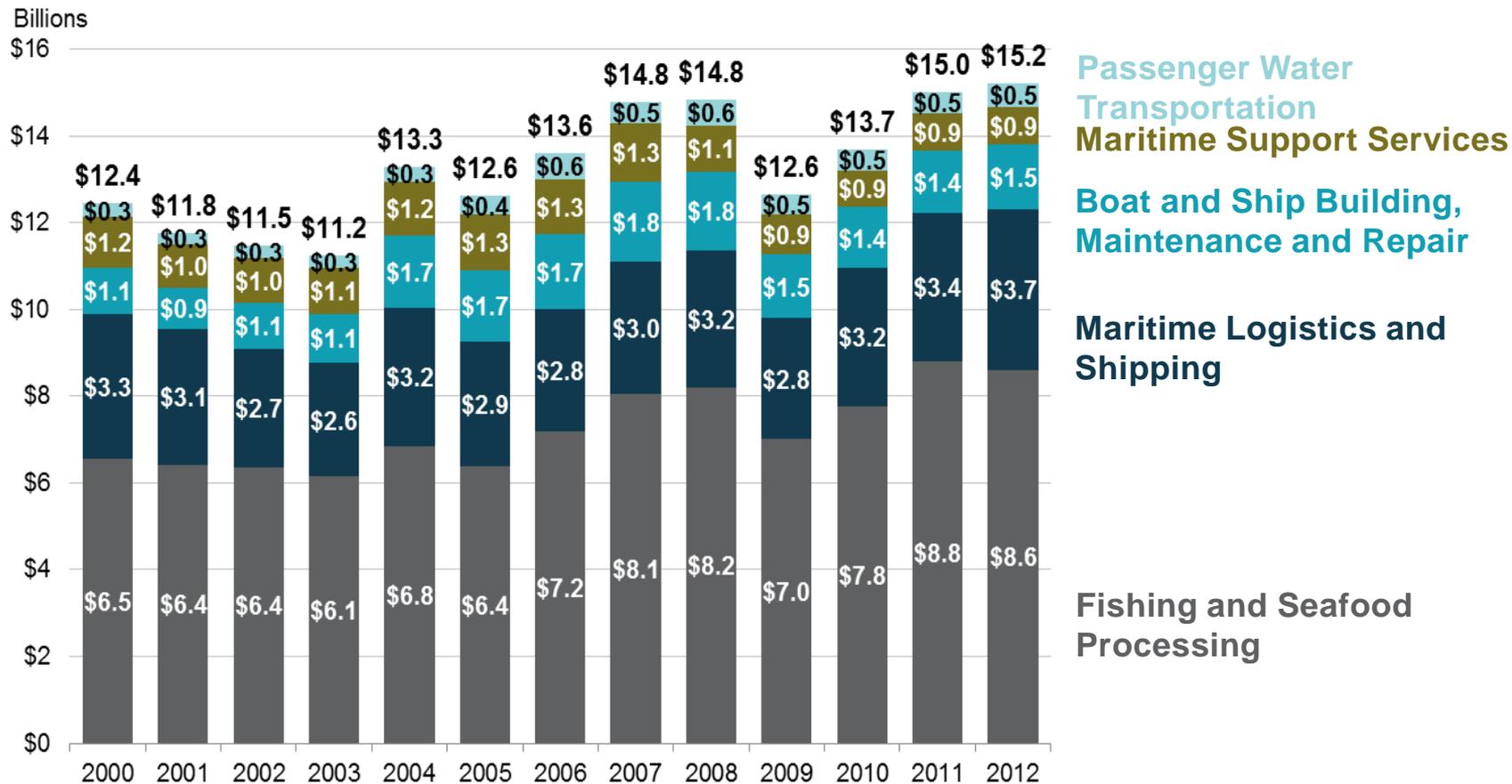
# WASHINGTON STATE MARITIME IMPACTS: establishment locations



# WASHINGTON STATE MARITIME IMPACTS: revenues

## Washington State Maritime Industry Gross Business Income

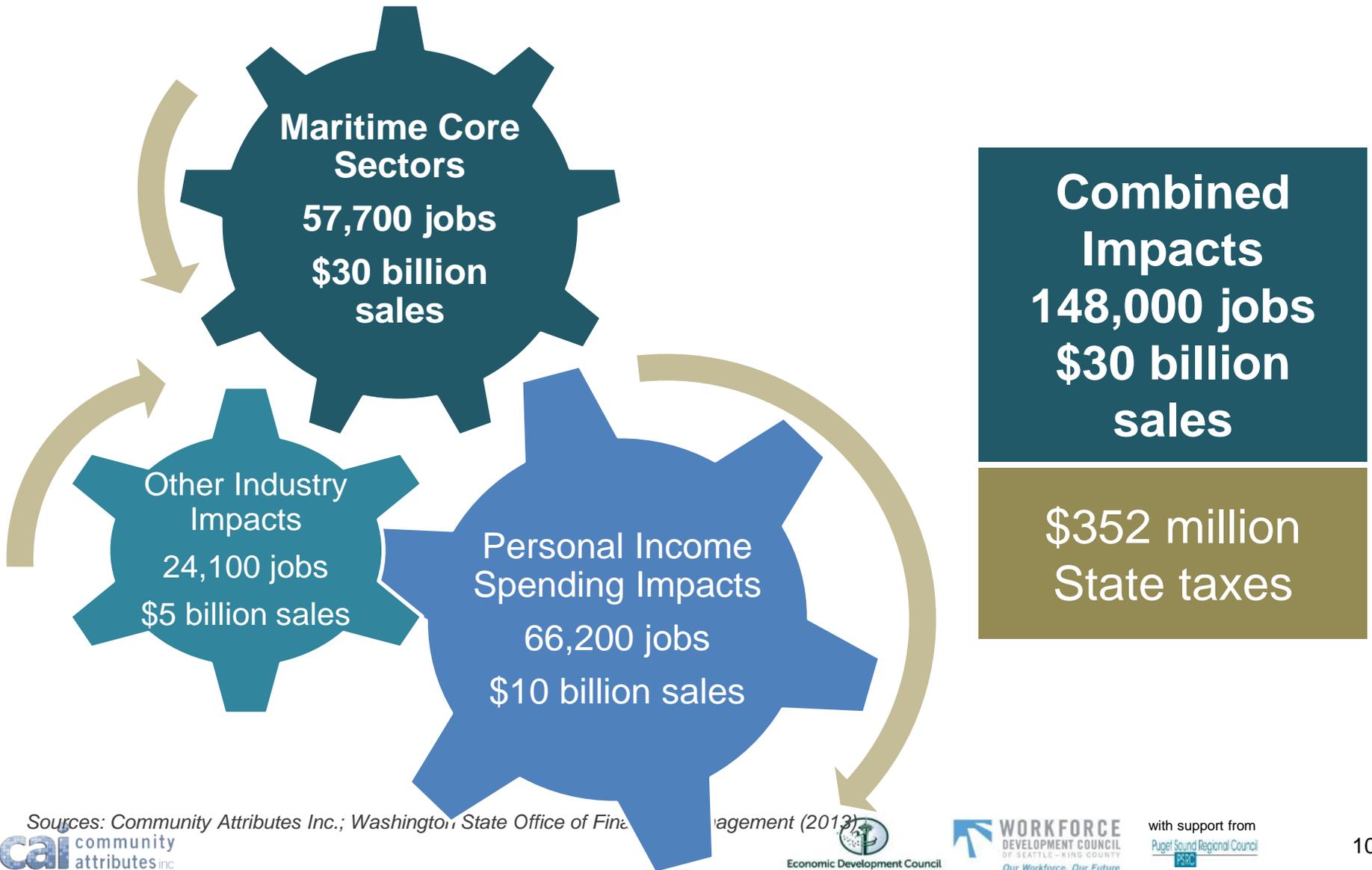
2000-2012, Annual, in 2012 \$



Sources: Community Attributes Inc.; Washington State Department of Revenue; U.S. Bureau of Economic Analysis (2013)

# WASHINGTON STATE MARITIME ECONOMIC IMPACTS

2007-2012, billions USD, adjusted to 2012 \$



Sources: Community Attributes Inc.; Washington State Office of Financial Management (2013)

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