

THE NORTHWEST SEAPORT ALLIANCE
MEMORANDUM

MANAGING MEMBERS
STAFF BRIEFING

Item No.: 10B
Meeting Date: July 1, 2025

DATE: June 23, 2025
TO: Managing Members
FROM: John Wolfe, CEO
Sponsor: Jason Jordan, Sr. Director Environmental & Planning Services
Project Managers: Deirdre Wilson, Director, Planning and Permitting and
Joseph Gellings, Senior Planner, Maritime Planning
SUBJECT: Economic Impact Analysis Briefing

A. SYNOPSIS

The Economic Impact Analysis report provides a comprehensive evaluation of the economic impacts of the varied activities directly linked to port operations broken out by the following:

The Northwest Seaport Alliance. Representing container cargo, autos, breakbulk, and bulk cargo shipments across the ports of Seattle and Tacoma.

Port of Seattle. Including SEA Airport, cruise ships, commercial fishing, recreational marinas, grain, other tenants at the Port of Seattle, and economic development, community, and environmental programs.

Port of Tacoma. Including autos, grain and gypsum, warehousing, light manufacturing, trucking, and other tenants at the Port of Tacoma, and environmental programs.

Analysis includes estimated direct activities—measured in jobs, income, and business output—directly supported by the above activities and associated nearby services directly tied to port operations (such as warehousing and off-site transloading) and the broader economic and fiscal impacts of these activities to the state economy.

B. BACKGROUND

An Interlocal Agreement (ILA) was entered into in 2024, by and between the Port of Seattle and Port of Tacoma and The Northwest Seaport Alliance for joint development of an Economic Impact Analysis which demonstrates comprehensive economic impacts and value across all lines of business.

The analysis includes local, regional, and state impacts on indirect, induced, and direct jobs; total compensation; business output; labor income; fiscal direct and secondary impacts; taxes; our equity impact, and special considerations for specific lines of business. This analysis is data driven using trusted and reliable sources, avoiding proprietary data which would be difficult to replicate.

Results of this analysis will:

- Inform volume trends for official statements in federal financial bonds
- Inform communications and marketing materials
- Support storytelling about the ports' value to the community
- Support grant applications and the advancement of legislation

C. FINANCIAL IMPLICATIONS

Using a competitive selection process, Community Attributes, Inc. was selected as the consultant for the project. Contracting for consultant support of Economic Impact Analysis was managed by the Port of Tacoma.

The Port of Seattle, Port of Tacoma, and Northwest Seaport Alliance each contributed staff time, and a proportionate cost of consultant support as follows: Port of Tacoma: 20%; NWSA: 20%; and the Port of Seattle: 60% based on the additional data provided and analysis requested by the Port of Seattle. The total cost of the consultant support needed to develop a joint Economic Impact Analysis will not exceed \$300,000. Invoices billed to May 31, 2025, total \$210,008.

D. ATTACHMENTS

- Attachment 1: Economic Impact Analysis report, 2025
- Attachment 2: Interlocal Agreement, 2024

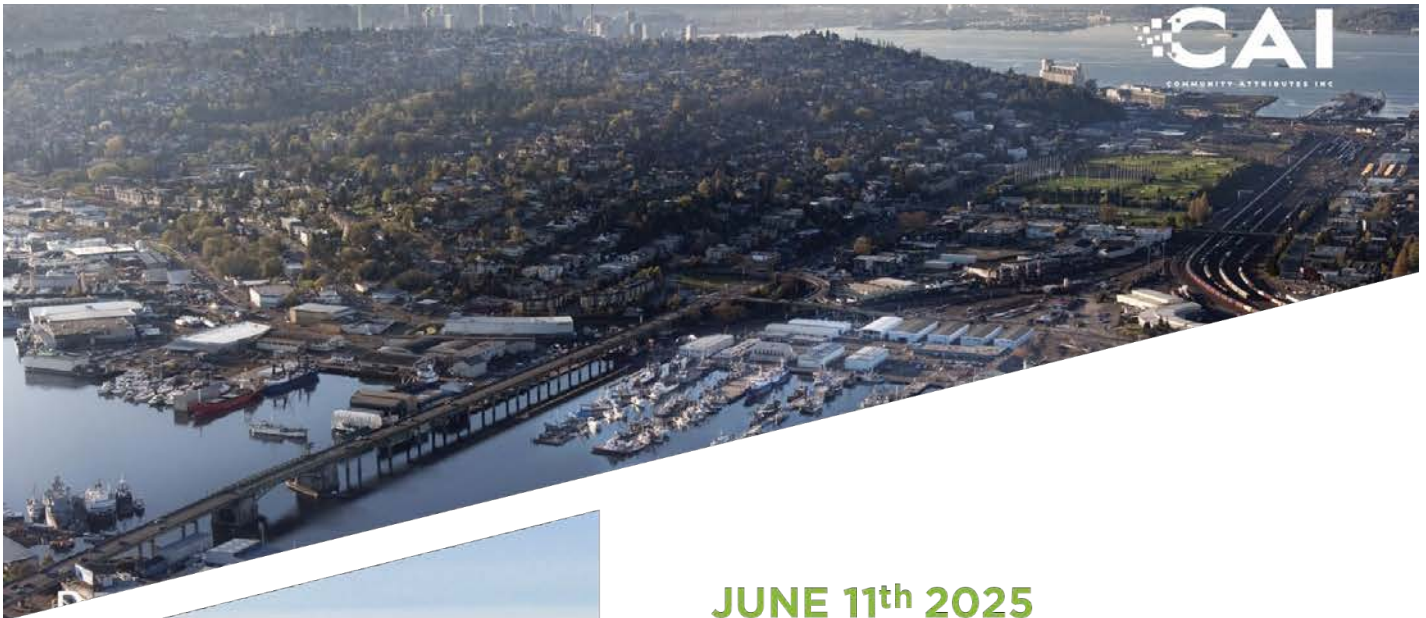
E. NEXT STEPS

Social media announcements and website updates are being coordinated by the Port of Tacoma, Port of Seattle, and Northwest Seaport and will include the overall impact as well as information appropriate for each line of business.

Moving forward, we will strive for joint Economic Impact Analysis updates every 3 years, understanding that some lines of business will need more frequent interim updates.

F. PREVIOUS ACTIONS OR BRIEFINGS

- Date: April 2, 2024, Action on ILA



JUNE 11th 2025

The Northwest Seaport
Alliance, Port of Tacoma,
and Port of Seattle

Economic and Community Impact Analysis



Port of Seattle®

Port of
Tacoma

THE NORTHWEST
SEAPORT ALLIANCE



*Community Attributes Inc. tells data-rich stories about communities
that are important to decision makers.*

President and CEO:
Chris Mefford

Project Manager:
Michaela Jellicoe

Analysts:
Martin Arpin
Carly Bednarski
Connor Hayes
Dominic Roche
Ethan Schmidt

Community Attributes Inc.
119 Pine St, Suite 400
Seattle, WA 98101

www.communityattributes.com

July 2025

The Northwest Seaport Alliance, Port of Tacoma, and Port of Seattle

Economic Impact Analysis

EXECUTIVE SUMMARY



The Northwest
Seaport Alliance
(2023)

\$14.0 Billion

Total Business Output

52,105

Total Jobs Supported

\$4.4 Billion

Total Employee Compensation

\$134 Million

Total State Fiscal Impact



Other Port of
Tacoma Activities
(2023)

\$2.0 Billion

Total Business Output

8,140

Total Jobs Supported

\$675 Million

Total Employee Compensation

\$19.8 Million

Total State Fiscal Impact



Seattle Airport
(2023)

\$33.4 Billion

Total Business Output

174,950

Total Jobs Supported

\$10.5 Billion

Total Employee Compensation

\$342 Million

Total State Fiscal Impact



Port of Seattle
Cruise Ship
Industry (2025)

\$1.2 Billion

Total Business Output

5,400

Total Jobs Supported

\$380 Million

Total Employee Compensation

\$11.9 Million

Total State Fiscal Impact



Port of Seattle
Commercial
Fishing (2023)

\$1.0 Billion

Total Business Output

8,790

Total Jobs Supported

\$484 Million

Total Employee Compensation

\$10.7 Million

Total State Fiscal Impact



Other Port of
Seattle Activities
(2023)

\$3.3 Billion

Total Business Output

16,035

Total Jobs Supported

\$1.3 Billion

Total Employee Compensation

\$33.7 Million

Total State Fiscal Impact

2023

Port of Tacoma, Port of Seattle, Northwest Seaport Alliance

Combined Economic Impact

PORT AUTHORITY LINE OF BUSINESS	TOTAL BUSINESS OUTPUT	TOTAL JOBS SUPPORTED	TOTAL EMPLOYEE COMPENSATION	TOTAL STATE FISCAL IMPACT
 THE NORTHWEST SEAPORT ALLIANCE	\$14.0 B	52,105	\$4.4 B	\$134 M
 Port of Tacoma	\$2 B	8,140	\$675 M	\$20 M
 Port of Seattle Cruise Ship Industry	\$1.2 B	5,060	\$357 M	\$11 M
 Port of Seattle Commercial Fishing	\$1.0 B	8,790	\$484 M	\$11 M
 Port of Seattle®	\$3.3 B	16,035	\$1.3 B	\$34 M
 SEA AIRPORT	\$33.4 B	174,950	\$10.5 B	\$342 M
TOTAL:	\$54.8 B	265,080	\$17.7 B	\$552 M

EXECUTIVE SUMMARY

The Northwest Seaport Alliance

The Northwest Seaport Alliance (NWSA) is one of the largest marine cargo operators in the United States. The NWSA annually handles millions of twenty-foot equivalent units (TEUs) of containerized cargo, reaching nearly three million TEUs in 2023. Nearly 80% of TEUs at the NWSA represent international imports or exports, with the remaining 20% representing containers shipped domestically to Alaska and Hawaii. In addition to containerized cargo, the NWSA handles automobiles, bulk, breakbulk, and other non-containerized cargo. In 2023, the NWSA operations supported an estimated 52,100 jobs, \$4.4 billion in total compensation, and nearly \$14 billion in total business output throughout the state of Washington (**Exhibit 1**).

Exhibit 1. NWSA Total Economic Impacts by Activity, Washington, 2023

	Direct	Indirect	Induced	Total
Containerized Cargo				
Jobs	16,100	10,030	20,160	46,290
Total Compensation (mils 2023 \$)	\$1,845.3	\$743.8	\$1,240.2	\$3,829.2
Business Output (mils 2023 \$)	\$6,373.7	\$2,416.6	\$3,748.8	\$12,539.1
Autos				
Jobs	1,195	710	1,830	3,735
Total Compensation (mils 2023 \$)	\$182.3	\$52.6	\$112.5	\$347.4
Business Output (mils 2023 \$)	\$409.8	\$158.4	\$340.1	\$908.3
Bulk, Breakbulk, and Other				
Jobs	720	440	920	2,080
Total Compensation (mils 2023 \$)	\$85.2	\$32.3	\$56.3	\$173.8
Business Output (mils 2023 \$)	\$267.2	\$106.8	\$170.1	\$544.2
Total				
Jobs	18,015	11,180	22,910	52,105
Total Compensation (mils 2023 \$)	\$2,112.7	\$828.7	\$1,409.0	\$4,350.4
Business Output (mils 2023 \$)	\$7,050.7	\$2,681.8	\$4,259.0	\$13,991.6

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Total state fiscal impacts supported by the NWSA operations totaled more than \$130 million in 2023 (**Exhibit 2**).

Exhibit 2. NWSA Total State Fiscal Impacts by Activity, Washington, 2023

	Direct	Secondary	Total
Containerized Cargo	\$21.0	\$98.6	\$119.6
Autos	\$1.7	\$8.1	\$9.9
Bulk, Breakbulk, and Other	\$0.8	\$3.8	\$4.6
Total	\$23.5	\$110.5	\$134.1

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Port of Tacoma

The Port of Tacoma's operations include automobile imports, non-containerized cargo handling, and real estate holdings that support a wide range of businesses supporting maritime operations. In 2023, the Port of Tacoma's total economic impact on the Washington economy totaled more than 8,000 jobs, \$675 million in total compensation, and nearly \$2 billion in business output (**Exhibit 3**).

Exhibit 3. Port of Tacoma Total Economic Impacts by Activity, Washington, 2023

	Direct	Indirect	Induced	Total
Tenants and Bulk Operations				
Jobs	1,850	890	2,060	4,800
Total Compensation (mils 2023 \$)	\$200.5	\$63.9	\$126.7	\$391.1
Business Output (mils 2023 \$)	\$579.2	\$215.2	\$382.9	\$1,177.3
Autos				
Jobs	1,190	650	1,500	3,340
Total Compensation (mils 2023 \$)	\$143.8	\$48.2	\$92.0	\$283.9
Business Output (mils 2023 \$)	\$375.6	\$145.0	\$277.9	\$798.6
Total				
Jobs	3,040	1,540	3,560	8,140
Total Compensation (mils 2023 \$)	\$344.3	\$112.1	\$218.6	\$675.0
Business Output (mils 2023 \$)	\$954.8	\$360.2	\$660.9	\$1,975.9

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Exhibit 4 presents the Port of Tacoma's total fiscal impacts generated in 2023 for the state of Washington. In total, the Port of Tacoma's operations helped generate an estimated \$20 million in state tax revenues.

**Exhibit 4. Port of Tacoma Total State Fiscal Impacts by Activity,
Washington, 2023**

	Direct	Secondary	Total
Tenants and Bulk Operations	\$1.6	\$6.9	\$8.5
Autos	\$1.9	\$9.4	\$11.3
Total	\$3.5	\$16.3	\$19.8

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Port of Seattle

The Port of Seattle’s operations include the SEA Airport, cruise, commercial fishing, recreational marinas, non-containerized cargo handling, and real estate holdings that support a diverse set of aviation, maritime, and other businesses. The Port of Seattle’s 2023 economic impacts total more than 204,500 jobs, \$12.6 billion in total compensation, and nearly \$39 billion in business output (**Exhibit 5**).

Exhibit 5. Port of Seattle Total Economic Impacts, Washington, 2023

	Direct	Indirect	Induced	Total
SEA Airport				
Jobs	94,510	25,140	55,300	174,950
Total Compensation (mils 2023 \$)	\$5,400.3	\$1,700.1	\$3,401.3	\$10,501.7
Business Output (mils 2023 \$)	\$17,380.5	\$5,709.6	\$10,281.1	\$33,371.3
Cruise				
Jobs	2,230	950	1,610	4,790
Total Compensation (mils 2023 \$)	\$134.5	\$71.6	\$98.7	\$304.9
Business Output (mils 2023 \$)	\$613.9	\$230.4	\$298.5	\$1,142.7
Commercial Fishing				
Jobs	5,770	470	2,550	8,790
Total Compensation (mils 2023 \$)	\$293.0	\$34.5	\$156.9	\$484.4
Business Output (mils 2023 \$)	\$418.2	\$145.9	\$474.2	\$1,038.3
Recreational Marinas				
Jobs	515	110	390	1,015
Total Compensation (mils 2023 \$)	\$42.3	\$7.4	\$23.8	\$73.5
Business Output (mils 2023 \$)	\$58.5	\$23.3	\$71.9	\$153.8
Tenants and Other Businesses				
Jobs	6,550	2,110	6,360	15,020
Total Compensation (mils 2023 \$)	\$662.7	\$154.4	\$391.4	\$1,208.5
Business Output (mils 2023 \$)	\$1,458.5	\$502.6	\$1,183.1	\$3,144.3
Total				
Jobs	109,575	28,780	66,210	204,565
Total Compensation (mils 2023 \$)	\$6,532.9	\$1,968.0	\$4,072.1	\$12,573.0
Business Output (mils 2023 \$)	\$19,929.6	\$6,611.9	\$12,308.8	\$38,850.3

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Total state fiscal impacts generated by the Port of Seattle in 2023 totaled \$396 million (**Exhibit 6**).

Exhibit 6. Port of Seattle Total State Fiscal Impacts, Washington, 2023

	Direct	Secondary	Total
SEA Airport	\$79.1	\$262.3	\$341.5
Cruise	\$2.3	\$8.1	\$10.3
Commercial Fishing	\$0.9	\$9.8	\$10.7
Recreational Marinas	\$0.2	\$1.6	\$1.9
Tenants and Other Businesses	\$4.8	\$27.0	\$31.8
Total	\$87.3	\$308.9	\$396.2

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

With the recent start of the cruise season, the Port of Seattle's cruise operations are anticipating another busy year. The 2025 cruise season is

projected to support 5,400 jobs, \$380 million in total compensation, and nearly \$1.28 billion in business revenues in 2025 (**Exhibit 7**). Port of Seattle’s cruise operations are projected to generate nearly \$12 million in state tax revenues in 2025.

Exhibit 7. Port of Seattle Cruise Operations Projected Total Economic Impacts, Washington, 2025

	Direct	Indirect	Induced	Total
Jobs	2,380	1,020	1,720	5,120
Total Compensation (mils 2023 \$)	\$143.9	\$76.9	\$105.8	\$326.6
Business Output (mils 2023 \$)	\$657.8	\$247.1	\$319.8	\$1,224.7

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Page intentionally left blank.

CONTENTS

Introduction	1
The Northwest Seaport Alliance	2
Port of Tacoma	21
Port of Seattle	29
Economic and Fiscal Impacts.....	62
Appendix A: The Northwest Seaport Alliance.....	64
Appendix B. Port of Tacoma	72
Appendix C. Port of Seattle	73
Appendix D. The NWSA, Port of Tacoma, and Port of Seattle.....	83

INTRODUCTION

Background and Purpose

The ports of Seattle and Tacoma combined represent a core economic development asset for businesses and communities in Washington state and throughout the United States. Together, the ports formed The Northwest Seaport Alliance (NWSA) to facilitate joint investments and operations of certain marine cargo facilities. The NWSA is one of the largest marine cargo gateways in the U.S. In 2023, 23.8 million metric tons of cargo were handled at cargo facilities managed by the NWSA. The majority of the 3 million TEUs of container cargo shipped through the NWSA were international.

SEA Airport, a part of the Port of Seattle, is a critical economic development asset for the Greater Seattle region, facilitating movement of people and cargo to, from, and through the region. Both the Port of Seattle and Port of Tacoma are also host to industrial activities that spur job growth and economic wealth creation in the Central Puget Sound and Washington state. Port of Seattle facilities are key assets for the growing cruise industry as well as the North Pacific Fisheries Fleet. The ports also provide significant community impacts through economic development, workforce development and environmental investments.

This report provides a comprehensive evaluation of the economic impacts of these varied activities directly linked to port operations broken out by the following:

- **The Northwest Seaport Alliance.** Representing container cargo, autos, breakbulk, and bulk cargo shipments across the ports of Seattle and Tacoma.
- **Port of Tacoma.** Including autos, grain and gypsum, warehousing, light manufacturing, trucking, and other tenants at the Port of Tacoma, and environmental programs.
- **Port of Seattle.** Including SEA Airport, cruise ships, commercial fishing, recreational marinas, grain, other tenants at the Port of Seattle, and economic development, community, and environmental programs.

Analysis includes estimated direct activities—measured in jobs, income, and business output—directly supported by the above activities and associated nearby services directly tied to port operations (such as warehousing and off-site transloading) and the broader economic and fiscal impacts of these activities to the state economy.

Methods

Data used in this report is drawn from several sources, including state and federal employment and wage data maintained by the Washington State

Employment Security Department, Puget Sound Regional Council, and U.S. Bureau of Labor Statistics; gross business income published by the Washington State Department of Revenue; cargo and trade statistics published by the U.S. Census Bureau and provided by The Northwest Seaport Alliance; and other relevant information maintained and provided by the Ports of Tacoma and Seattle and The Northwest Seaport Alliance. Direct activities were further modeled to account for missing information when necessary.

Economic impacts include additional jobs, income, and business output supported through upstream business-to-business transactions (indirect impacts) and household consumption expenditures (induced impacts). Economic impact modeling leverages the Washington State Input-Output Model, with customizations to model localized economic conditions. Fiscal impacts include state tax revenues derived from direct port-related activities and through multiplier effects among other industries and regions of the state.

Organization of the Report

The remainder of this report is organized as follows:

- **The Northwest Seaport Alliance.** Review of key indicators, facilities, and direct and total impacts for containerized cargo, autos, breakbulk, and other cargo managed by the NWSA.
- **Port of Tacoma.** Discussion of facilities and direct and total impacts for the tenants, auto import, bulk cargo operations managed by the Port of Tacoma.
- **Port of Seattle.** Summary of SEA Airport, projected cruise operations, commercial fishing, recreational marinas, tenants, a grain terminal, and other commercial business operations managed by the Port of Seattle.
- **Economic and Fiscal Impacts.** Provides the combined direct and total economic impacts across The Northwest Seaport Alliance, Port of Tacoma, and Port of Seattle.
- **Community and Equity Impacts and Reach.** Analyzes impacts of community, workforce, economic development, and environmental programs managed by the Port of Tacoma and Port of Seattle, as well as the equity impacts of The Northwest Seaport Alliance, Port of Tacoma, and Port of Seattle.
- **Summary and Conclusions.** Summary of key findings.

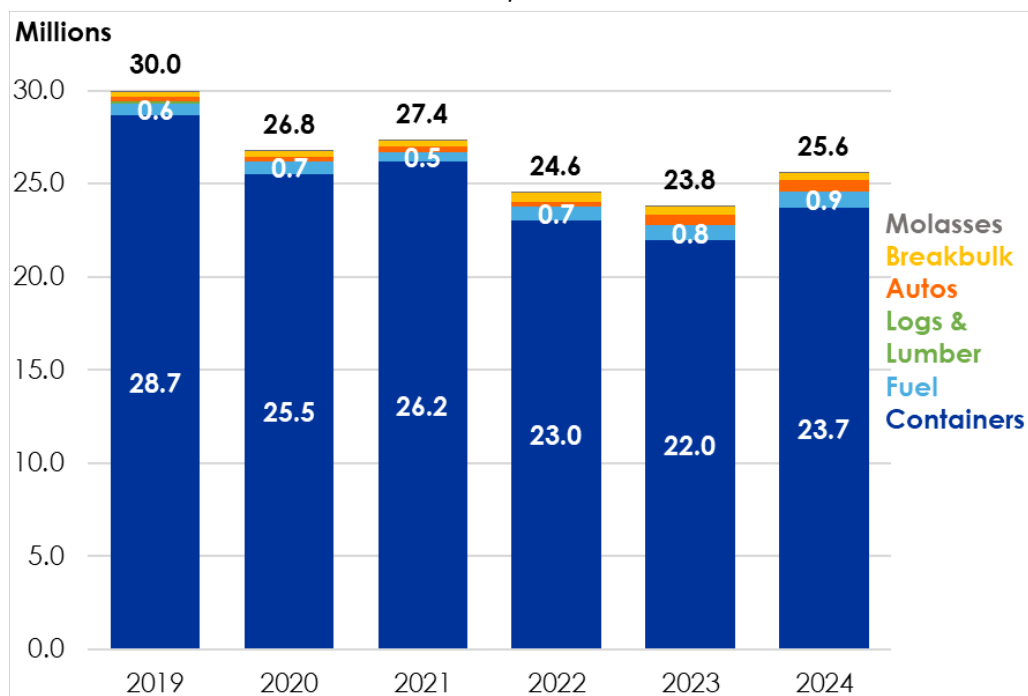
THE NORTHWEST SEAPORT ALLIANCE

In 2023, approximately 23.8 million metric tons of cargo were handled at the NWSA, including 22 million metric tons of containerized cargo (**Exhibit 8**).

In the same year, the NWSA handled almost 1,700 vessel calls. Between 2019 and 2023, more than 132 million metric tons of marine cargo were handled through the NWSA. Over this period, total marine cargo tonnage decreased from approximately 30 million metric tons in 2019 to 23.8 million in 2023. Containerized marine cargo represented the majority of cargo handled at the NWSA between 2019 and 2023, accounting for more than 92% of metric tonnage each year over this period. Approximately 3.4% of all marine cargo handled in 2023 was fuel. The NWSA also handled automobiles, breakbulk, fuel, and molasses over this period.

The Northwest Seaport Alliance also manages real estate, providing industrial, warehouse, and office space supporting the marine cargo handling activities of the NWSA. In 2023 The Northwest Seaport Alliance managed over 1-million square feet of industrial space, 934,000 square feet of warehousing space, and more than 153,000 square feet of office space.

Exhibit 8. Marine Cargo by Type, Metric Tons, The Northwest Seaport Alliance, 2019-2024



Sources: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Containerized Cargo

Activities under containerized cargo include all operations, services, and facilities related to the handling of 20-, 40-, and 45-foot ocean cargo containers as well as domestic 24-, 48-, and 53-foot boxes, both outbound and inbound. The activities span container terminal facilities in the ports of Seattle and Tacoma, under management of The Northwest Seaport Alliance.

In 2023, the NWSA handled approximately 2.97 million twenty-foot equivalent units (TEUs)¹ (**Exhibit 9**). Of all TEUs processed in 2023, nearly 72% were full, including nearly 470,000 domestic TEUs, while the remaining 28.2% of TEUs were empty. More than 75% of all TEUs in 2023 were handled as either international import or export shipments by the NWSA. Total domestic inbound and outbound TEUs accounted for the remaining 25% of all TEUs handled at The NWSA in 2023.

Both full and empty containers are loaded and off-loaded from vessels, requiring the expertise of a wide range of industries and occupations, including terminal operators, longshore workers, truckers, and more. Full and empty containers both are considered in the estimation of economic and fiscal impacts generated by containerized cargo handled through the NWSA.

Exhibit 9. Containerized Cargo Volumes, Full and Empty TEUs, International and Domestic Imports and Export, The Northwest Seaport Alliance, 2023

	Full	Empty	Total
Imports	1,078,005	76,958	1,154,963
Exports	588,744	493,060	1,081,804
Domestic Imports	102,979	248,817	351,796
Domestic Exports	364,909	20,944	385,853
Total	2,134,637	839,779	2,974,416

Sources: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

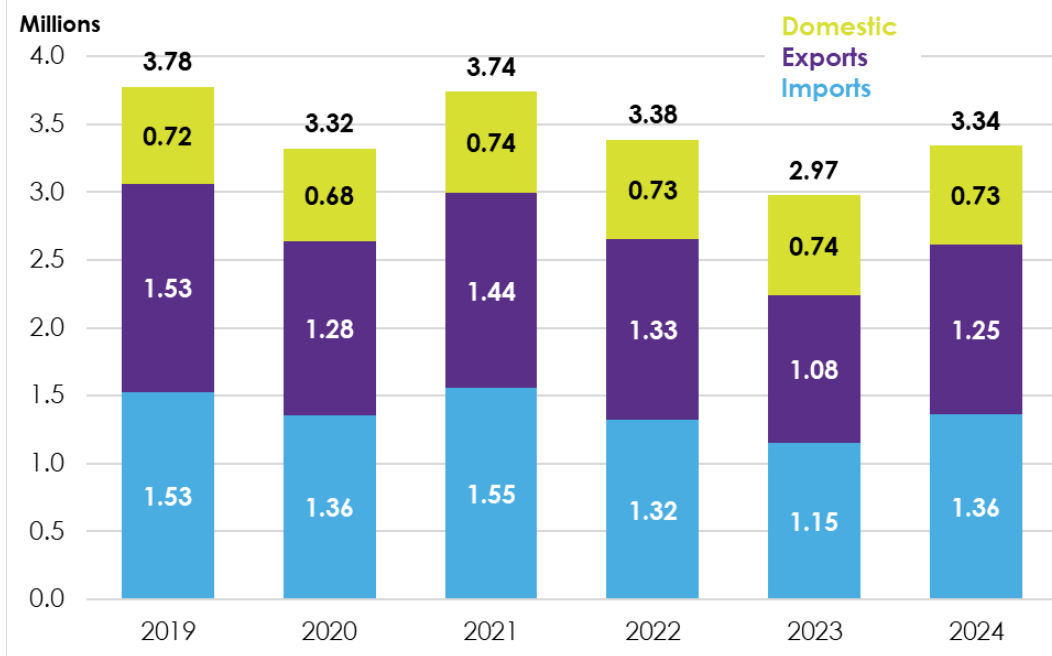
Exhibit 10 presents the total volume of containerized imports and exports handled at The Northwest Seaport Alliance between 2019 and 2023. Total TEUs have decreased between 2019 and 2023 from a high of 3.8 million in 2019 to 3.0 million in 2023. This can be attributed to a mix of global trade disruptions, shifting shipping patterns, cooling retail spending growth, regional competition, and global trade policies such as tariffs.^{2,3}

¹ The Northwest Seaport Alliance measures international and domestic containerized cargo in twenty-foot equivalent units (TEUs).

² <https://apnews.com/article/china-us-tariffs-timeline-trump-xi-1eed2865dc7b14e23d7eb8069ba41ea>

³ <https://mykn.kuehne-nagel.com/news/article/a-tale-of-three-coasts-how-the-pandemic-shift-25-Jul-2023>

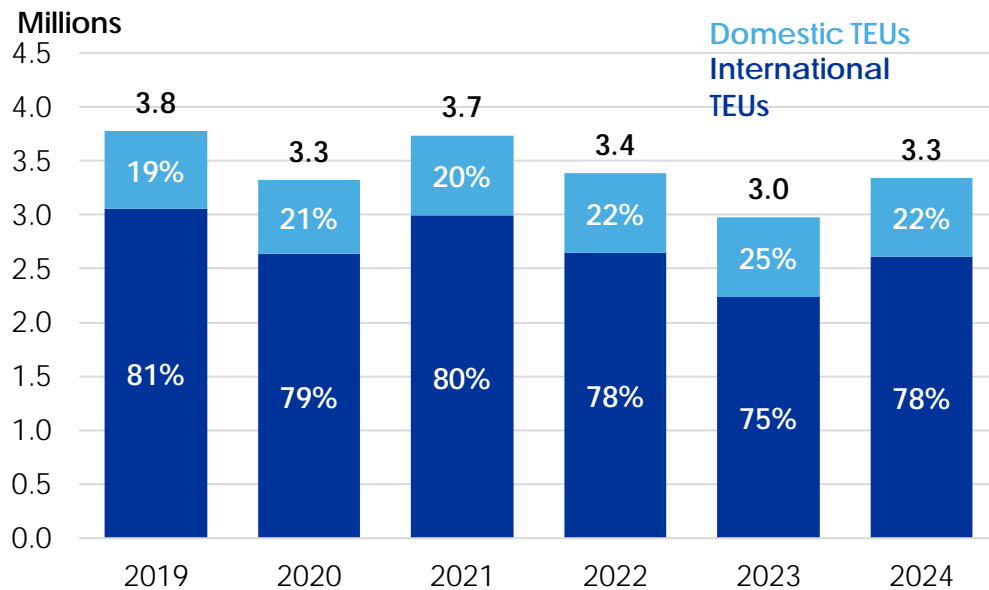
Exhibit 10. Imports, Exports, and Domestic TEUs, The Northwest Seaport Alliance, 2019 – 2024



Sources: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Domestic TEUs accounted for an increasing portion of total TEU volume since 2019, growing from 19% of all TEUs in 2019 to nearly 25% in 2023 (**Exhibit 11**).

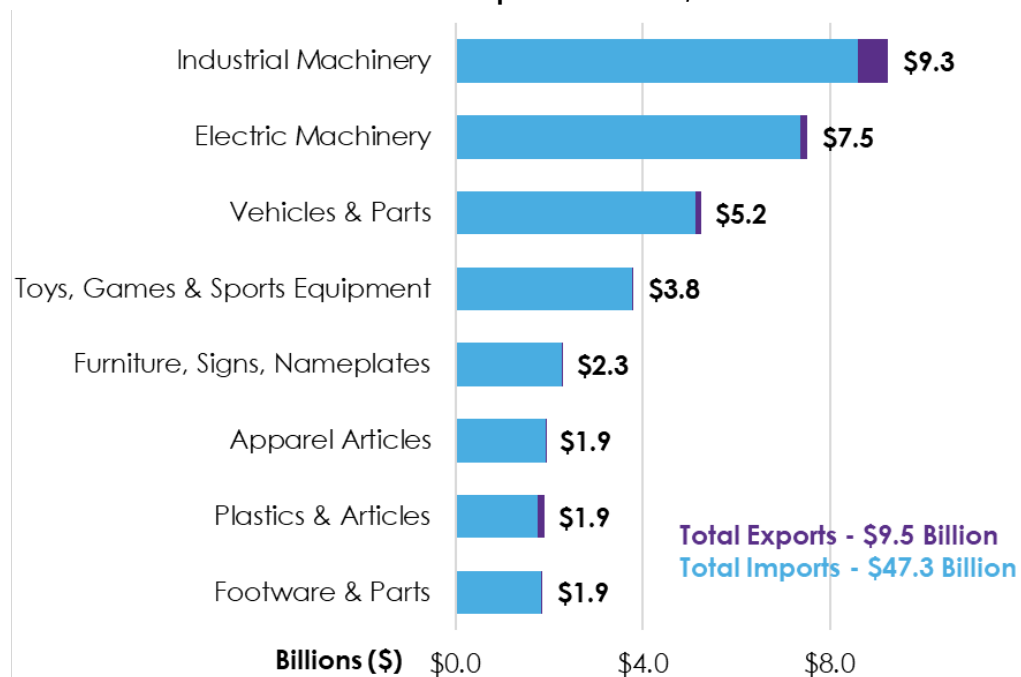
Exhibit 11. Containerized Cargo Volumes, TEUs, The Northwest Seaport Alliance, 2017-2024



Sources: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

In 2023, total containerized imports and exports handled by the NWSA totaled approximately \$56.8 billion in value, of which more than \$47 billion was from imports (**Exhibit 12**). The combined value of imported and exported industrial machinery commodities represented the greatest value of all commodities handled in 2023, accounting for \$9.3 billion in total import/export value, or slightly more than 16% of containerized vessel value. Other notable commodities handled at the NWSA include electric machinery (\$7.5 billion); vehicles and parts (\$5.2 billion); toys, games, and sports equipment (\$3.8 billion); furniture, signs, nameplates (\$2.3 billion); apparel articles (\$1.9 billion); plastics & articles (\$1.9 billion); and footwear & parts (\$1.9 billion).

Exhibit 12. Billions of Containerized Cargo Commodity Value, Commodities Each Representing More Than 3% of Total Vessel Value, The Northwest Seaport Alliance, 2023

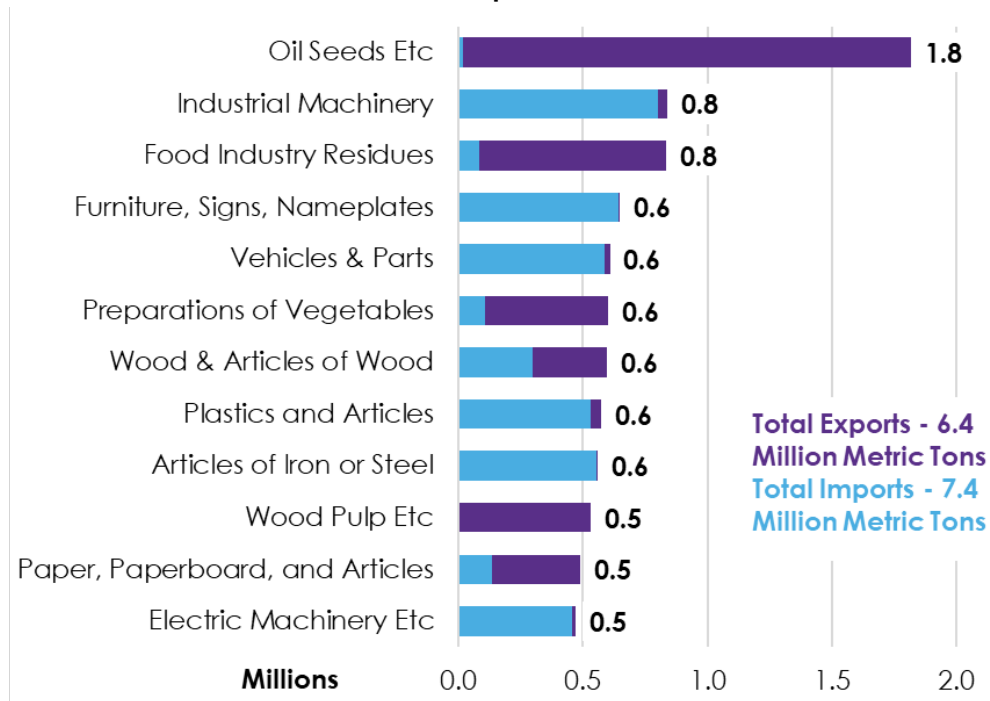


Sources: WISERTrade Import & Export Data by two-digit Harmonized System (HS) Commodity Code, wisetrade.org; 2024; The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Exhibit 13 shows the largest import and export commodities by weight in metric tons, handled at the NWSA in 2023, which represent at least 3% or more of total containerized vessel weight. Oil seeds, predominately from exported volume, accounted for the largest single-commodity proportion of total vessel weight in 2023, at just greater than 13%. Industrial machinery and food industry residues each accounted for 0.8 million metric tons of total vessel weight handled by the NWSA. Other notable commodities with significant import/export vessel weight include furniture, signs, nameplates; vehicles and parts; preparations of vegetables; wood and articles of wood;

plastics and articles; and articles of iron or steel, all which totaled approximately 0.6 million metric tons in total vessel weight in 2023.

Exhibit 13. Millions of Metric Tons of Containerized Cargo Commodities Each Representing More Than 3% of Total Vessel Weight, Metric Tons, The Northwest Seaport Alliance, 2023



Sources: WISERTrade Import & Export Data by two-digit HS Commodity Code, wisetrade.org; 2024; The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

The total containerized vessel weight in metric tons by commodity handled at The Northwest Seaport Alliance is shown on **Exhibit 14**. Combined import and export vessel weight for oil seeds is the greatest single-commodity trade volume in 2023. In total, the 13 largest commodities by trade volume represent nearly 65% of all traded commodities to be processed by the NWSA in 2023, and the five largest commodities by trade volume account for more than 34% of all trade volume in 2023.

Exhibit 14. Containerized Cargo by Commodity, Metric Tons, The Northwest Seaport Alliance, 2023

Commodity	Vessel Weight		Total
	Imports	Exports	
Oil Seeds Etc	20,920	1,797,410	1,818,330
Industrial Machinery	803,280	37,870	841,150
Food Industry Residues	83,040	753,140	836,180
Furniture, Signs & Nameplates	643,960	2,400	646,360
Vehicles & Parts	588,340	20,390	608,730
Preparation of Vegetables	109,320	491,220	600,540
Wood & Articles of Wood	297,890	299,220	597,110
Plastics and Articles	532,440	40,850	573,290
Articles of Iron or Steel	555,120	6,560	561,680
Pulp of Wood	680	532,890	533,570
Paper & Paperboard	137,440	350,950	488,390
Electric Machinery	456,180	14,640	470,820
Edible Vegetables	20,730	349,210	369,940
Other	3,138,850	1,712,240	4,851,090
Total	7,388,190	6,408,990	13,797,180

Sources: WISERTrade Import & Export Data by two-digit HS Commodity Code, wisertrade.org; 2024; The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

In 2023, China was the NWSA's largest trading partner, as measured in total TEU volume, accounting for nearly 40% of all TEUs traded in 2023. Of the total import and export volume handled through the NWSA with China, nearly 84% of goods are imports. Other prominent trade partners for the NWSA include Japan (approximately 215,000 TEUs), Vietnam (nearly 160,000 TEUs), South Korea (Approximately 143,000 TEUs), and Taiwan (More than 106,000 TEUs) (**Exhibit 15**).

Exhibit 15. Containerized Cargo by Country, TEUs, The Northwest Seaport Alliance, 2023

Country	Import TEUs	Export TEUs	Total TEUs
China	542,280	104,070	646,350
Japan	83,640	131,180	214,820
Vietnam	135,810	23,670	159,480
South Korea	52,670	90,210	142,880
Taiwan	52,730	53,670	106,400
Thailand	38,460	18,620	57,080
Indonesia	22,330	18,550	40,880
Malaysia	12,140	25,520	37,660
India	15,240	7,650	22,900
Philippines	7,480	12,940	20,420
Hong Kong	2,990	10,100	13,090
Singapore	4,680	7,000	11,680
Other	80,420	67,100	147,510
Total	1,050,870	570,280	1,621,150

Sources: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Exhibit 16 presents total TEUs by country handled by the NWSA from 2017 through 2023. China has remained the country that ships the most TEUs through the NWSA since 2017. Japan and Vietnam were the second and third most consistent trade partner from 2017 through 2023.

Exhibit 16. Containerized Cargo by Country, TEUs, The Northwest Seaport Alliance, 2017-2023

Country	2017	2018	2019	2020	2021	2022	2023
China	832,890	924,210	770,670	674,040	820,940	785,000	646,350
Japan	110,310	98,750	106,820	76,900	82,990	214,510	214,820
Vietnam	56,290	64,760	90,730	127,730	147,310	185,590	159,480
South Korea	61,880	65,150	56,910	50,420	67,780	160,780	142,880
Taiwan	63,980	62,990	67,170	64,200	73,390	95,710	106,400
Thailand	27,980	27,590	37,860	39,950	45,540	66,750	57,080
Indonesia	22,470	27,680	26,940	25,500	29,430	49,180	40,880
Malaysia	19,080	22,300	21,120	18,140	18,290	39,690	37,660
India	16,260	16,420	20,660	18,020	15,280	19,970	22,900
Philippines	8,610	7,210	10,260	7,970	9,200	25,290	20,420
Hong Kong	23,460	21,630	14,620	9,610	10,110	13,170	13,090
Singapore	4,530	4,730	7,520	6,700	5,570	15,240	11,680
Other	126,260	144,950	157,250	148,410	123,660	120,740	147,510
Total	1,374,000	1,488,370	1,388,530	1,267,590	1,449,490	1,791,620	1,621,150

Sources: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Direct activities associated with the movement of ocean cargo containers, both full and empty, include on-site stevedoring operations, drayage, rail operations, tug assists for vessels, off-site transloading facilities, warehousing and distribution centers, non-drayage trucking, local and

federal government personnel supporting or regulating containerized cargo, and various support services.

Containerized cargo activities directly supported 16,100 jobs in 2023. This roughly totals one direct job supported by every 1,000 TEUs shipped through the NWSA. The largest source of employment supported was transportation including rail, trucking, logistics and warehousing (12,880). Terminal operations include administrative staff, on-site stevedoring personnel, and longshoremen, with containerized cargo activities supporting 2,420 jobs across both harbors. Additional services supporting the movement of containerized cargo through the NWSA include maritime support services and navigational services including tug assists and pilots. **(Exhibit 17)**

**Exhibit 17. NWSA Containerized Cargo Direct Impact Estimates by
Economic Activity, Washington, 2023**

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Rail, Truck Transportation, Logistics & Warehousing	12,880	\$5,012.8	\$1,336.0
Terminal Operations, Stevedoring & Longshoremen	2,420	\$984.3	\$409.1
Maritime Support Services	340	\$75.8	\$35.6
Government	280	\$221.7	\$39.0
Navigational Services	180	\$79.0	\$25.5
Total	16,100	\$6,373.7	\$1,845.3

Sources: The Northwest Seaport Alliance, 2025; Port of Seattle, 2025; Port of Tacoma, 2025; Puget Sound Regional Council, 2025; BNSF, 2025; Union Pacific, 2025; Freight Analysis Framework 5.0, 2025; Puget Sound Pilots, 2025; U.S. Coast Guard, 2025; U.S. Customs and Border Protection, 2025; American Railroad Association, 2025; U.S. Railroad Retirement Board, 2025; U.S. Census Bureau, 2025; U.S. Bureau of Labor Statistics, 2025; Washington State Department of Revenue, 2025; Washington State Employment Security Department, 2025; Community Attributes, 2025.

Containerized cargo activities in total supported 46,300 jobs in Washington, including direct, indirect, and induced impacts. Total economic impacts of containerized cargo activities supported more than \$3.8 billion in wages and total compensation accounted for \$12.5 billion in business revenue in 2023. Over half the business revenue is generated directly from the movement of containerized cargo through the NWSA **(Exhibit 18)**. In total, it is estimated that for every 35 TEUs that are handled by the NWSA, one job is supported throughout the state.

**Exhibit 18. NWSA Containerized Cargo Total Economic Impacts,
Washington, 2023**

	Direct	Indirect	Induced	Total
Jobs	16,100	10,030	20,160	46,290
Total Compensation (mils 2023 \$)	\$1,845.3	\$743.8	\$1,240.2	\$3,829.2
Business Output (mils 2023 \$)	\$6,373.7	\$2,416.6	\$3,748.8	\$12,539.1

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

The NWSA containerized cargo operations supported an estimated \$120 million in statewide fiscal impacts in 2023 (**Exhibit 19**).

**Exhibit 19. NWSA Containerized Cargo Total State Fiscal Impacts,
Washington, 2023, Millions**

	Direct	Secondary	Total
B&O	\$20.9	\$32.1	\$53.0
Sales & Use Taxes	\$0.1	\$58.3	\$58.5
Other	\$0.0	\$8.1	\$8.1
Total	\$21.0	\$98.6	\$119.6

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Containerized cargo operations at the NWSA also support economic and fiscal impacts in cities throughout the region. **Exhibit 20** presents total economic impacts including jobs, business output, and total compensation by city. Total economic impacts include direct impacts, as well as indirect impacts, or jobs, output, and compensation supported by business-to-business transactions, as well as induced impacts (jobs, output and compensation supported through the spending of worker compensation). **Exhibit 20** also presents the total state sales, business and occupation, and other taxes supported by total economic activity within each city. Local taxes represent the local sales and business and occupation taxes supported by total economic activity within each city.

**Exhibit 20. NWSA Containerized Cargo Total Economic and Fiscal Impacts,
Top Ten Cities by Jobs Impact, 2023**

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Tacoma	10,880	\$2,964.1	\$939.0	\$27.61	\$8.25	\$35.86
Seattle	8,190	\$2,290.3	\$745.3	\$20.06	\$5.86	\$25.92
Sumner	1,940	\$587.2	\$185.8	\$2.82	\$0.33	\$3.14
Puyallup	1,660	\$361.5	\$121.2	\$4.23	\$1.36	\$5.59
Kent	1,220	\$386.2	\$117.6	\$3.11	\$0.83	\$3.93
DuPont	1,120	\$345.1	\$109.3	\$1.38	\$0.10	\$1.48
Federal Way	1,080	\$199.9	\$69.3	\$3.22	\$1.15	\$4.37
Fife	850	\$266.2	\$84.1	\$1.28	\$0.18	\$1.46
Bellevue	770	\$155.2	\$56.5	\$2.22	\$0.77	\$2.99
Gig Harbor	770	\$134.6	\$47.1	\$2.38	\$0.61	\$3.00

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

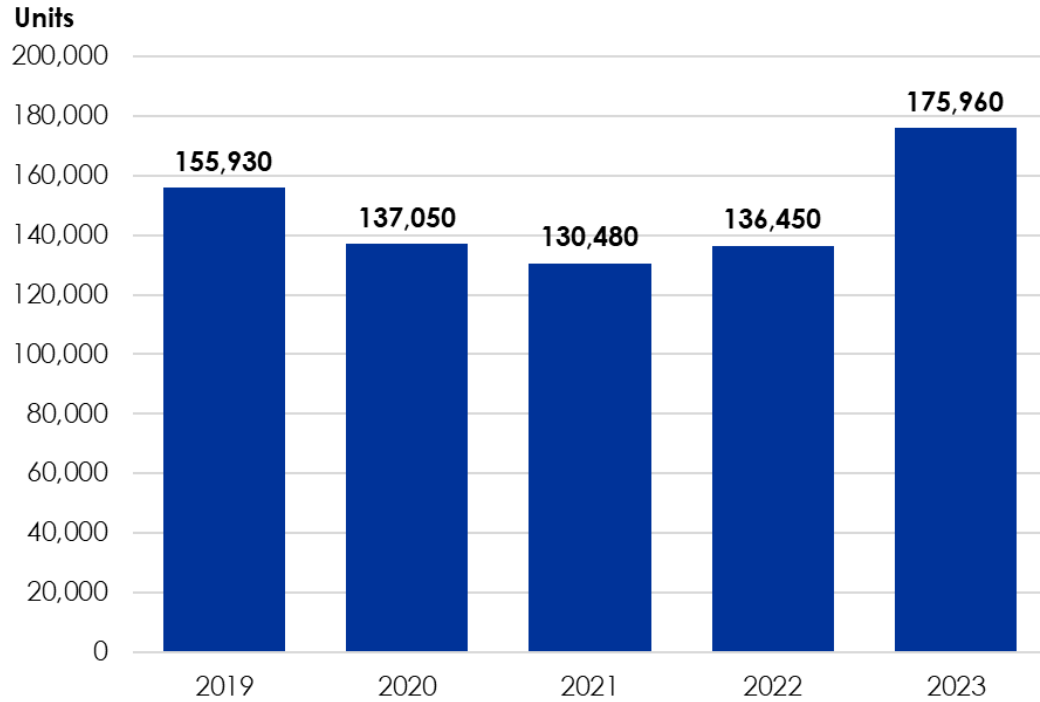
Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Automobile Imports

Exhibit 21 shows the total number of whole automobile units which were handled at the NWSA between 2019 and 2023.⁴ The number of automobiles moving through the NWSA reached a five-year high of approximately 176,000 units in 2023, equivalent to a 29% year-over-year increase from 2022. In total, the number of automobile units annually handled at the NWSA increased by 12.8% from 2019 to 2023.

⁴ Automobile parts are separately imported through containerized cargo.

Exhibit 21. Automobiles Units, The Northwest Seaport Alliance, 2019-2023



Source: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Direct activities supported by the movement of automobiles managed by the NWSA include on-site stevedoring operations; trucking and rail transportation; auto accessory installation services; tug assists for car carriers; local and federal government personnel supporting or regulating automobile imports; and various supporting services.

Automobile import activities directly supported 1,195 jobs in 2023, equaling roughly 1 job for every 150 automobiles imported by the NWSA. Rail, truck transportation, and logistics supported 780 jobs. Terminal operations include the activities of auto warehousing, providing logistics and accessory installation services, as well as on-site stevedoring personnel and longshoreman totaling 300 jobs supported by the movement of automobiles through the NWSA in 2023 (**Exhibit 22**).

Exhibit 22. NWSA Automobile Direct Impact Estimates by Economic Activity, Washington, 2023

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Rail, Truck Transportation, Logistics & Warehousing	780	\$244.0	\$101.8
Terminal Operations, Stevedoring & Longshoremen	300	\$122.9	\$66.7
Maritime Support Services	80	\$18.7	\$8.8
Navigational Services	30	\$13.0	\$4.5
Government	5	\$11.3	\$0.5
Total	1,195	\$409.8	\$182.3

Sources: The Northwest Seaport Alliance, 2025; Port of Seattle, 2025; Port of Tacoma, 2025; Puget Sound Regional Council, 2025; BNSF, 2025; Union Pacific, 2025; Freight Analysis Framework 5.0, 2025; Puget Sound Pilots, 2025; U.S. Coast Guard, 2025; U.S. Customs and Border Protection, 2025; American Railroad Association, 2025; U.S. Railroad Retirement Board, 2025; U.S. Census Bureau, 2025; U.S. Bureau of Labor Statistics, 2025; Washington State Department of Revenue, 2025; Washington State Employment Security Department, 2025; Community Attributes, 2025.

Exhibit 23 presents total economic impacts associated with the NWSA automobile operations. The Washington economy benefited from the NWSA automobile import operations through the support of 3,735 jobs in 2023. Those employees were paid \$347 million in compensation, including benefits, and accounted for more than \$908 million in business revenue. Each direct job in this sector was associated with an additional 2.1 jobs throughout Washington. For every 50 automobiles imported through the NWSA one job is supported throughout the statewide economy.

Exhibit 23. NWSA Automobile Total Economic Impacts, Washington, 2023

	Direct	Indirect	Induced	Total
Jobs	1,195	710	1,830	3,735
Total Compensation (mils 2023 \$)	\$182.3	\$52.6	\$112.5	\$347.4
Business Output (mils 2023 \$)	\$409.8	\$158.4	\$340.1	\$908.3

Sources: Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

Automobile imports at the NWSA are estimated to have generated nearly \$10 million in statewide fiscal impacts in 2023 (**Exhibit 24**).

Exhibit 24. NWSA Automobile Total State Fiscal Impacts, Washington, 2023,
Millions

	Direct	Secondary	Total
B&O	\$1.7	\$2.6	\$4.4
Sales & Use Taxes	\$0.0	\$4.9	\$4.9
Other	\$0.0	\$0.6	\$0.6
Total	\$1.7	\$8.1	\$9.9

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Automobile import operations at the NWSA also support economic and fiscal impacts in cities throughout the region (**Exhibit 25**). Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

**Exhibit 25. NWSA Automobile Total Economic and Fiscal Impacts, Top Ten
Cities by Jobs Impact, 2023**

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Tacoma	1,190	\$318.7	\$124.2	\$2.90	\$1.38	\$4.28
Seattle	420	\$82.0	\$29.9	\$1.30	\$0.70	\$2.00
Sumner	230	\$69.1	\$28.8	\$0.36	\$0.03	\$0.39
Puyallup	170	\$37.4	\$14.4	\$0.42	\$0.13	\$0.55
DuPont	130	\$41.3	\$17.4	\$0.19	\$0.05	\$0.24
Fife	100	\$31.1	\$13.0	\$0.16	\$0.01	\$0.17
Federal Way	90	\$16.0	\$5.6	\$0.29	\$0.11	\$0.39
Uninc. Pierce	80	\$23.8	\$9.9	\$0.14	\$0.02	\$0.15
Gig Harbor	70	\$12.3	\$4.3	\$0.22	\$0.06	\$0.28
Lakewood	60	\$14.8	\$6.0	\$0.12	\$0.03	\$0.15

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

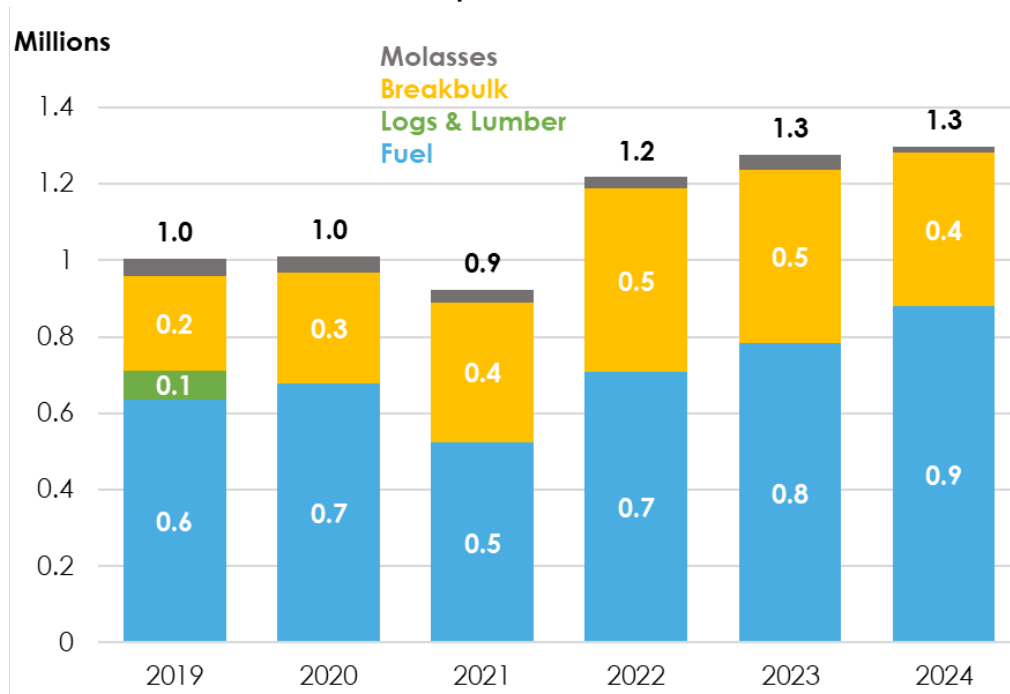
Note: As of 2024, the NWSA started handling automobile units at North Harbor (Port of Tacoma) facilities as well as South Harbor (Port of Seattle) facilities. These impacts only reflect impacts as of 2023, therefore only reflect South Harbor activities. Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Breakbulk, Bulk and Other Non-Containerized Cargo

The Northwest Seaport Alliance manages the flow of a wide variety of marine cargo beyond containerized cargo and automobiles. Other marine cargo includes fuel, breakbulk, and molasses. The majority of breakbulk cargo transport is transported via roll-on/roll-off vessels.

Exhibit 26 presents the total non-containerized marine cargo volume in metric tons to pass through the NWSA between 2019 and 2024. Over this time, total non-containerized volume increased from approximately 1.0 million metric tons in 2019 to around 1.3 million metric tons in 2023, with annual increases between 2021 and 2024 in total non-containerized volume. Breakbulk, including agriculture and mining equipment, military vehicles for example, processed by the NWSA reached a six-year peak of nearly 480,000 metric tons in 2022. As of 2023, the total volume of Breakbulk processed by the NWSA was 500,000 metric tons. Bulk marine cargo, including fuel, logs, and molasses, increased from approximately 759,000 metric tons in 2019 to more than 900,000 metric tons in 2023. Fuel cargo represented the majority of all non-containerized bulk marine cargo over this period, including more than 800,000 metric tons in 2023, or slightly more than 98%. Of the fuel cargo imported through the NWSA, 57% is unrefined crude oil, while the remaining 43% of imported fuel cargo are refined petroleum products. Fuel exports out of the NWSA are dominated by refined petroleum products, 77% of which are petroleum oils and 21% are petroleum gases.

Exhibit 26. Marine Cargo by Type (excluding container), Metric Tons, The Northwest Seaport Alliance, 2019-2024



Source: The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

Breakbulk, fuel, and other non-containerized marine cargo handled through the NWSA directly supports a wide range of jobs. In total, these activities directly supported 720 jobs in 2023. Maritime support services and rail and truck transportation represent the largest portion of direct jobs, with a combined total of 550 jobs. (**Exhibit 27**)

Exhibit 27. NWSA Breakbulk, Bulk, and Other Imports Direct Impact Estimates by Economic Activity, Washington, 2023

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Maritime Support Services	350	\$78.4	\$36.8
Rail, Truck Transportation, Logistics & Warehousing	200	\$97.0	\$22.3
Terminal Operations, Stevedoring & Longshoremen	70	\$30.0	\$12.9
Navigational Services	90	\$39.9	\$12.2
Government	10	\$22.1	\$1.0
Total	720	\$267.2	\$85.2

Sources: The Northwest Seaport Alliance, 2025; Port of Seattle, 2025; Port of Tacoma, 2025; Puget Sound Regional Council, 2025; BNSF, 2025; Union Pacific, 2025; Freight Analysis Framework 5.0, 2025; Puget Sound Pilots, 2025; U.S. Coast Guard, 2025; U.S. Customs and Border Protection, 2025; American Railroad Association, 2025; U.S. Railroad Retirement Board, 2025; U.S. Census Bureau, 2025; U.S. Bureau of Labor Statistics, 2025; Washington State Department of Revenue, 2025; Washington State Employment Security Department, 2025; Community Attributes, 2025.

The NWSA breakbulk, bulk, and other non-containerized cargo shipping activities supported a total of 2,080 jobs in Washington in 2023 (**Exhibit 28**). While employees were paid nearly \$174 million in wages and benefits, the industry supported more than \$544 million in output. For every 1,000 tons of non-containerized cargo processed by the NWSA, just over 1 job is supported in the state of Washington.

Exhibit 28. NWSA Breakbulk, Bulk, and Other Imports Total Economic Impacts, Washington, 2023

	Direct	Indirect	Induced	Total
Jobs	720	440	920	2,080
Total Compensation (mils 2023 \$)	\$85.2	\$32.3	\$56.3	\$173.8
Business Output (mils 2023 \$)	\$267.2	\$106.8	\$170.1	\$544.2

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Exhibit 29 presents the total statewide fiscal impacts generated by the NWSA’s breakbulk, bulk, and other marine cargo activities. In total, it is estimated that \$4.6 million in statewide tax revenues were generated by the NWSA’s breakbulk, bulk, and other marine cargo operations.

Exhibit 29. NWSA Breakbulk, Bulk, and Other Imports Total State Fiscal Impacts, Washington, 2023, Millions

	Direct	Secondary	Total
B&O	\$0.8	\$1.3	\$2.1
Sales & Use Taxes	\$0.0	\$2.3	\$2.3
Other	\$0.0	\$0.2	\$0.2
Total	\$0.8	\$3.8	\$4.6

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Breakbulk, bulk, and other marine cargo activities at the NWSA also support economic and fiscal impacts in cities throughout the region (**Exhibit 30**). Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

**Exhibit 30. NWSA Breakbulk, Bulk, and Other Marine Cargo Imports Total
Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023**

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Seattle	690	\$193.8	\$68.7	\$1.15	\$0.79	\$1.94
Tacoma	420	\$113.2	\$34.6	\$1.15	\$0.58	\$1.74
Puyallup	60	\$11.8	\$4.0	\$0.17	\$0.06	\$0.23
Federal Way	50	\$8.2	\$2.9	\$0.14	\$0.05	\$0.19
Sumner	40	\$10.6	\$3.3	\$0.07	\$0.01	\$0.08
Gig Harbor	30	\$6.1	\$2.1	\$0.11	\$0.03	\$0.13
Bellevue	30	\$5.6	\$2.1	\$0.10	\$0.04	\$0.14
Kent	20	\$6.5	\$1.8	\$0.10	\$0.04	\$0.14
DuPont	20	\$5.7	\$1.8	\$0.03	\$0.01	\$0.04
Redmond	20	\$3.6	\$1.3	\$0.06	\$0.02	\$0.08

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Economic and Fiscal Impacts

The Northwest Seaport Alliance supported more than 52,100 jobs in the Washington economy in 2023 through their marine cargo services. In total, supported workers earned more than \$4.3 billion in total compensation, including benefits, and supported nearly \$14 billion in business output throughout the year. The largest contributor to the Washington economy was the containerized cargo segment which accounted for 46,300 jobs, \$3.8 billion in total compensation, and \$12.5 billion in business output (**Exhibit 31**).

Exhibit 31. NWSA Total Economic Impacts by Activity, Washington, 2023

	Direct	Indirect	Induced	Total
Containerized Cargo				
Jobs	16,100	10,030	20,160	46,290
Total Compensation (mils 2023 \$)	\$1,845.3	\$743.8	\$1,240.2	\$3,829.2
Business Output (mils 2023 \$)	\$6,373.7	\$2,416.6	\$3,748.8	\$12,539.1
Autos				
Jobs	1,195	710	1,830	3,735
Total Compensation (mils 2023 \$)	\$182.3	\$52.6	\$112.5	\$347.4
Business Output (mils 2023 \$)	\$409.8	\$158.4	\$340.1	\$908.3
Bulk, Breakbulk, and Other				
Jobs	720	440	920	2,080
Total Compensation (mils 2023 \$)	\$85.2	\$32.3	\$56.3	\$173.8
Business Output (mils 2023 \$)	\$267.2	\$106.8	\$170.1	\$544.2
Total				
Jobs	18,015	11,180	22,910	52,105
Total Compensation (mils 2023 \$)	\$2,112.7	\$828.7	\$1,409.0	\$4,350.4
Business Output (mils 2023 \$)	\$7,050.7	\$2,681.8	\$4,259.0	\$13,991.6

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Similarly, the containerized cargo services run by the NWSA generated the majority of fiscal impacts generated by the NWSA for the state of Washington. The activities contributed \$21 million directly to the state of Washington, including the downstream impacts the NWSA activities generated a total of \$134 million in state tax revenues (**Exhibit 32**).

Exhibit 32. NWSA Total Fiscal Impacts by Activity, Washington, 2023

	Direct	Secondary	Total
Containerized Cargo	\$21.0	\$98.6	\$119.6
Autos	\$1.7	\$8.1	\$9.9
Bulk, Breakbulk, and Other	\$0.8	\$3.8	\$4.6
Total	\$23.5	\$110.5	\$134.1

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Tacoma and Seattle saw the largest impact supported by the NWSA's operations compared to other cities in the region (**Exhibit 33**). Together, the NWSA's operations were estimated to support nearly 21,800 jobs, nearly \$6 billion in business output, and \$1.9 billion in total compensation in Tacoma and Seattle. Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and

local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

**Exhibit 33. NWSA Total Economic and Fiscal Impacts, Top Ten Cities by
Jobs Impact, 2023**

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Tacoma	12,490	\$3,396.0	\$1,097.7	\$31.67	\$10.21	\$41.88
Seattle	9,300	\$2,566.1	\$843.9	\$22.50	\$7.35	\$29.86
Sumner	2,210	\$666.9	\$217.9	\$3.25	\$0.37	\$3.61
Puyallup	1,890	\$410.7	\$139.7	\$4.82	\$1.55	\$6.37
DuPont	1,270	\$392.0	\$128.4	\$1.60	\$0.15	\$1.76
Kent	1,240	\$392.8	\$119.4	\$3.21	\$0.87	\$4.08
Federal Way	1,220	\$224.0	\$77.7	\$3.65	\$1.31	\$4.96
Fife	950	\$297.3	\$97.1	\$1.44	\$0.19	\$1.63
Gig Harbor	870	\$153.1	\$53.5	\$2.71	\$0.70	\$3.41
Bellevue	800	\$160.8	\$58.5	\$2.32	\$0.81	\$3.13

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

PORT OF TACOMA

The Port of Tacoma, beyond supporting the marine cargo operations of the NWSA, is an important real estate and economic development asset to the region. The Port of Tacoma manages more than 2,700 acres of real estate property, including 2,300 acres of industrially zoned property. As a part of their operations, the Port of Tacoma manages roughly 610,000 square feet in warehousing space and 757,000 square feet of other industrial space. The Port of Tacoma also operates roughly 345,000 square feet of office space. Many of the tenants on those properties directly support the marine cargo operations of The Northwest Seaport Alliance. However, the Port of Tacoma provides land and building space serving both industrial and non-industrial tenants and activities as well. The Fabulich Center provides commercial office space for tenants who provide a wide range of services throughout the region.

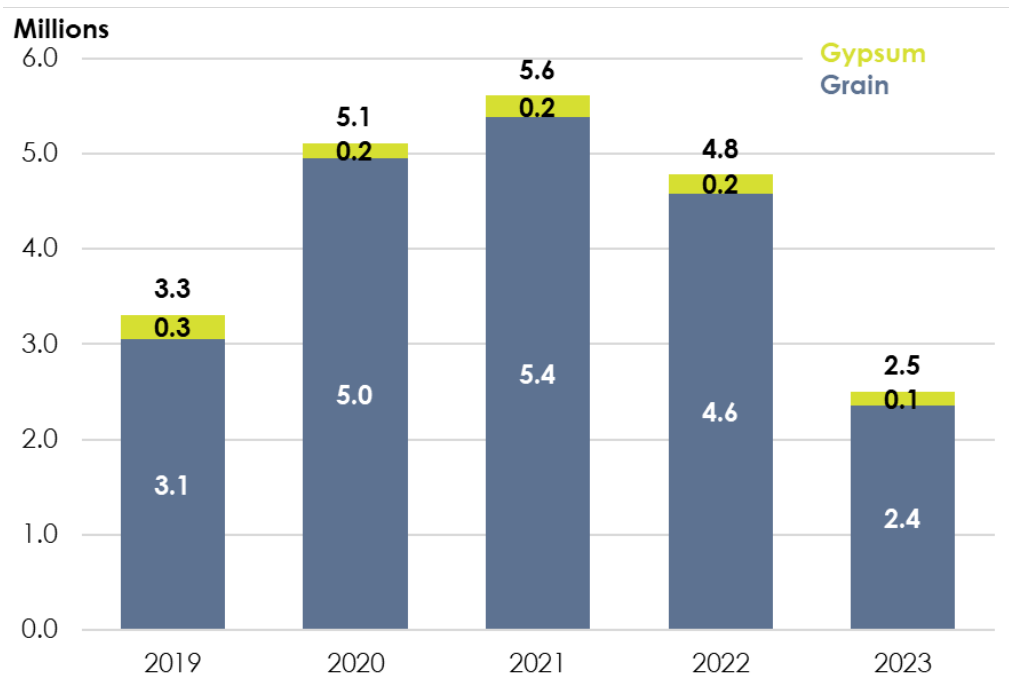
Outside of the NWSA marine cargo operations, the Port of Tacoma also provides bulk cargo operations at the TEMCO Grain Terminal, as well as bulk gypsum operations at Georgia Pacific Gypsum. Additionally, in 2018, the Port of Tacoma began providing auto import operations beyond those

already handled at the NWSA. Auto import operations at the Port of Tacoma reached nearly 163,000 auto units in 2023.

Tenants and Bulk Operations

Exhibit 34 presents marine cargo managed by the Port of Tacoma between 2019 and 2023. Over this period an annual average of more than 4.2 million metric tons of grain and gypsum was handled by the Port of Tacoma. More than 92% of this marine cargo annually was grain. In 2023, gypsum represented 5.8% of all other marine cargo at the Port of Tacoma. In total, approximately 2.5 million metric tons of grain and gypsum in 2023 passed through the Port of Tacoma, a more than 55% decrease from the five-year peak of 5.6 million metric tons in 2021.

Exhibit 34. Other Marine Cargo by Type, Metric Tons, Port of Tacoma, 2019-2023



Sources: Port of Tacoma, 2024; The Northwest Seaport Alliance; Community Attributes Inc., 2025.

In 2023, the Port of Tacoma's other tenants (excluding those supporting marine cargo activities at the NWSA), bulk operations, and Port of Tacoma employment supported 1,850 jobs (**Exhibit 35**) which supported nearly \$605 million in business revenue, and nearly \$201 million in labor income.

**Exhibit 35. Port of Tacoma Tenants and Other Business Direct Impact
Estimates by Economic Activity, Washington, 2023**

Activity	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023 \$)
Services and Non-Industrial Tenants	700	\$106.1	\$66.9
Bulk Operations	530	\$263.4	\$70.9
Construction and Resource Operations	300	\$78.3	\$28.2
Manufacturing	220	\$126.6	\$17.5
Port of Tacoma Staff	100	\$30.5	\$17.1
Total	1,850	\$604.8	\$200.5

Sources: The Northwest Seaport Alliance, 2025; Port of Tacoma, 2025; Puget Sound Regional Council, 2025; BNSF, 2025; Union Pacific, 2025; Freight Analysis Framework 5.0, 2025; Puget Sound Pilots, 2025; U.S. Coast Guard, 2025; U.S. Customs and Border Protection, 2025; American Railroad Association, 2025; U.S. Railroad Retirement Board, 2025; U.S. Census Bureau, 2025; U.S. Bureau of Labor Statistics, 2025; Washington State Department of Revenue, 2025; Washington State Employment Security Department, 2025; Community Attributes, 2025.

The Port of Tacoma’s tenants, excluding those supporting marine cargo activities at the NWSA, and other businesses, which include bulk operations, supported 4,800 jobs throughout the Washington economy in 2023. Total compensation generated by the Port of Tacoma’s tenants and other businesses totaled \$391 million and business output totaled nearly \$1.2 billion in 2023 (**Exhibit 36**).

**Exhibit 36. Port of Tacoma Tenants and Other Business Total Economic
Impacts, Washington, 2023**

	Direct	Indirect	Induced	Total
Jobs	1,850	890	2,060	4,800
Total Compensation (mils 2023 \$)	\$200.5	\$63.9	\$126.7	\$391.1
Business Output (mils 2023 \$)	\$579.2	\$215.2	\$382.9	\$1,177.3

Sources: Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

Exhibit 37 presents the Port of Tacoma’s tenants and other businesses’ total state fiscal impacts generated in 2023. The Port of Tacoma’s tenants and other businesses supported \$11.3 million in state tax revenues in 2023.

Exhibit 37. Port of Tacoma Tenants and Other Business Total State Fiscal Impacts, Washington, 2023

	Direct	Secondary	Total
B&O	\$1.9	\$3.2	\$5.0
Sales & Use Taxes	\$0.0	\$5.5	\$5.5
Other	\$0.0	\$0.8	\$0.8
Total	\$1.9	\$9.4	\$11.3

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Activities at the Port of Tacoma, including tenants and bulk cargo operations support economic and fiscal impacts in cities throughout the region (**Exhibit 38**). Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

Exhibit 38. Port of Tacoma Tenants and Other Business Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Tacoma	2,120	\$568.6	\$197.1	\$2.92	\$1.61	\$4.54
Seattle	270	\$51.9	\$19.1	\$0.90	\$0.48	\$1.38
Puyallup	220	\$39.1	\$13.6	\$0.67	\$0.24	\$0.92
Bonney Lake	70	\$12.2	\$4.3	\$0.21	\$0.06	\$0.27
Gig Harbor	60	\$10.4	\$3.6	\$0.18	\$0.05	\$0.23
Bellevue	50	\$10.4	\$4.0	\$0.18	\$0.08	\$0.26
Auburn	50	\$11.6	\$3.6	\$0.20	\$0.09	\$0.29
Renton	40	\$11.0	\$3.0	\$0.19	\$0.08	\$0.27
Lakewood	40	\$7.2	\$2.5	\$0.12	\$0.04	\$0.17
Kent	30	\$11.4	\$2.9	\$0.20	\$0.09	\$0.29

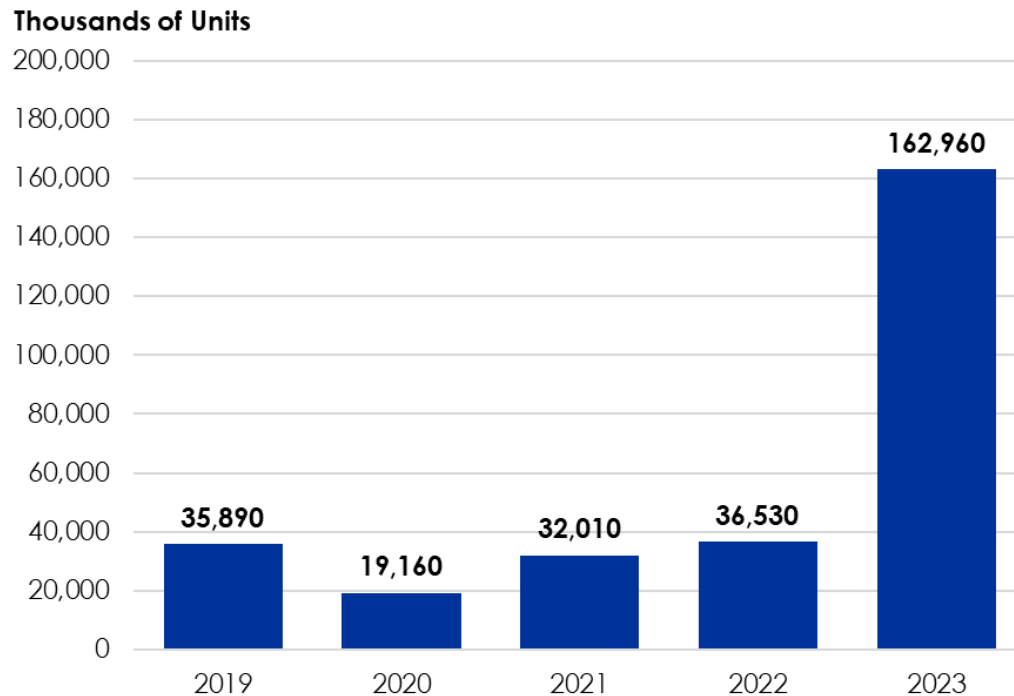
Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Automobile Imports

Exhibit 39 shows the total number of automobile units processed by the Port of Tacoma between 2019 and 2023. The Taylor Way Auto Facility opened in 2018 and allows the Port of Tacoma to support auto imports, which are mostly transported to the Midwest by rail.⁵ In 2023, the Port of Tacoma handled the import of nearly 163,000 automobile units, representing 48% of all automobile units across the combined total of the NWSA and Port of Tacoma.

Exhibit 39. Automobile Units, Port of Tacoma, 2019 – 2023



Sources: *The Northwest Seaport Alliance, 2024; Port of Tacoma, 2024; Community Attributes Inc., 2025.*

Automobile import activities at the Port of Tacoma directly supported 1,190 jobs in 2023, in addition to the jobs supported by auto import activities at the NWSA. Rail, truck transportation, and logistics supported 720 jobs. Terminal operations including logistics and accessory installation services, as well as on-site stevedoring personnel and longshoreman totaling 280 jobs supported by the movement of automobiles through the Port of Tacoma in 2023 (**Exhibit 40**). Roughly one job is supported by every 136 automobiles imported through the Port of Tacoma.

⁵ <https://www.portoftacoma.com/news/auto-processing-facility-emblematic-commitment-clean-waterways>

**Exhibit 40. Port of Tacoma Automobile Direct Impact Estimates by
Economic Activity, Washington, 2023**

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Rail, Truck Transportation, Logistics & Warehousing	720	\$226.0	\$70.8
Terminal Operations, Stevedoring & Longshoremen	280	\$113.8	\$46.3
Maritime Support Services	80	\$17.3	\$8.1
Government	80	\$6.6	\$14.5
Navigational Services	30	\$12.0	\$4.1
Total	1,190	\$375.6	\$143.8

Sources: The Northwest Seaport Alliance, 2025; Port of Tacoma, 2025; Puget Sound Regional Council, 2025; BNSF, 2025; Union Pacific, 2025; Freight Analysis Framework 5.0, 2025; Puget Sound Pilots, 2025; U.S. Coast Guard, 2025; U.S. Customs and Border Protection, 2025; American Railroad Association, 2025; U.S. Railroad Retirement Board, 2025; U.S. Census Bureau, 2025; U.S. Bureau of Labor Statistics, 2025; Washington State Department of Revenue, 2025; Washington State Employment Security Department, 2025; Community Attributes, 2025.

Throughout the Washington economy the Port of Tacoma’s automobile import activity supported more than 3,300 jobs in 2023. More than 1,800 jobs were directly supported or supported through supply chain transactions. In total, workers associated with Port of Tacoma automobile importing activities earned an estimated \$284 million in total compensation, while the Port of Tacoma automobile operations supported nearly \$799 million in business output in 2023 (**Exhibit 41**).

**Exhibit 41. Port of Tacoma Automobile Total Economic Impacts,
Washington, 2023**

	Direct	Indirect	Induced	Total
Jobs	1,190	650	1,500	3,340
Total Compensation (mils 2023 \$)	\$143.8	\$48.2	\$92.0	\$283.9
Business Output (mils 2023 \$)	\$375.6	\$145.0	\$277.9	\$798.6

Sources: Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

Total state fiscal impacts generated by the Port of Tacoma’s automobile operations totaled an estimated \$8.5 million 2023 (**Exhibit 42**).

**Exhibit 42. Port of Tacoma Automobile Total State Fiscal Impacts,
Washington, 2023**

	Direct	Secondary	Total
B&O	\$1.6	\$2.2	\$3.8
Sales & Use Taxes	\$0.0	\$4.1	\$4.1
Other	\$0.0	\$0.5	\$0.5
Total	\$1.6	\$6.9	\$8.5

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Activities supporting automobile imports at the Port of Tacoma support economic and fiscal impacts in cities throughout the region (**Exhibit 43**). Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

**Exhibit 43. Port of Tacoma Automobile Total Economic and Fiscal Impacts,
Top Ten Cities by Jobs Impact, 2023**

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Tacoma	1,130	\$290.8	\$118.8	\$2.49	\$1.18	\$3.68
Seattle	330	\$59.1	\$21.8	\$1.06	\$0.57	\$1.63
Sumner	210	\$63.7	\$20.2	\$0.33	\$0.02	\$0.35
Puyallup	140	\$32.6	\$10.9	\$0.35	\$0.10	\$0.45
DuPont	120	\$38.2	\$12.1	\$0.18	\$0.04	\$0.22
Fife	90	\$28.8	\$9.1	\$0.15	\$0.01	\$0.16
Federal Way	70	\$13.1	\$4.6	\$0.24	\$0.09	\$0.32
Uninc. Pierce	70	\$22.0	\$7.1	\$0.13	\$0.01	\$0.14
Gig Harbor	60	\$10.0	\$3.5	\$0.18	\$0.05	\$0.23
Lakewood	50	\$13.3	\$4.4	\$0.11	\$0.02	\$0.13

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Economic and Fiscal Impacts

In 2023, the Port of Tacoma's auto imports, bulk operations, and tenant businesses, excluding those supporting marine cargo operations at the NWSA, supported more than 8,100 jobs throughout Washington. Additionally, the Port of Tacoma's operations supported nearly \$680 million in total compensation, and nearly \$2 billion in business output throughout the state (**Exhibit 44**).

Exhibit 44. Port of Tacoma Total Economic Impacts by Activity, Washington, 2023

	Direct	Indirect	Induced	Total
Tenants and Bulk Operations				
Jobs	1,850	890	2,060	4,800
Total Compensation (mils 2023 \$)	\$200.5	\$63.9	\$126.7	\$391.1
Business Output (mils 2023 \$)	\$579.2	\$215.2	\$382.9	\$1,177.3
Autos				
Jobs	1,190	650	1,500	3,340
Total Compensation (mils 2023 \$)	\$143.8	\$48.2	\$92.0	\$283.9
Business Output (mils 2023 \$)	\$375.6	\$145.0	\$277.9	\$798.6
Total				
Jobs	3,040	1,540	3,560	8,140
Total Compensation (mils 2023 \$)	\$344.3	\$112.1	\$218.6	\$675.0
Business Output (mils 2023 \$)	\$954.8	\$360.2	\$660.9	\$1,975.9

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

In total, these operations at the Port of Tacoma supported nearly \$20 million in state taxes (**Exhibit 45**).

Exhibit 45. Port of Tacoma Total Fiscal Impacts by Activity, Washington, 2023

	Direct	Secondary	Total
Tenants and Bulk Operations	\$1.6	\$6.9	\$8.5
Autos	\$1.9	\$9.4	\$11.3
Total	\$3.5	\$16.3	\$19.8

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

The Port of Tacoma's economic impacts are concentrated within the City of Tacoma. In 2023, the Port of Tacoma's operations were estimated to support more than 3,200 jobs, \$860 million in business output, and \$316 million in total compensation within the City of Tacoma (**Exhibit 46**). Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state

and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

Exhibit 46. Port of Tacoma Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023, Millions

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Tacoma	3,250	\$859.4	\$315.9	\$5.42	\$2.79	\$8.21
Seattle	600	\$111.0	\$40.9	\$1.96	\$1.05	\$3.01
Puyallup	360	\$71.7	\$24.5	\$1.03	\$0.35	\$1.37
Sumner	210	\$63.7	\$20.2	\$0.33	\$0.02	\$0.35
DuPont	120	\$38.2	\$12.1	\$0.18	\$0.04	\$0.22
Gig Harbor	120	\$20.4	\$7.2	\$0.36	\$0.09	\$0.45
Fife	90	\$28.8	\$9.1	\$0.15	\$0.01	\$0.16
Lakewood	90	\$20.5	\$6.9	\$0.23	\$0.07	\$0.30
Federal Way	70	\$13.1	\$4.6	\$0.24	\$0.09	\$0.32
Bonney Lake	70	\$12.2	\$4.3	\$0.21	\$0.06	\$0.27

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

PORT OF SEATTLE

The Port of Seattle supports a diverse range of activities throughout King County and Washington. SEA Airport serves as a key asset to Washington, supporting businesses and passengers throughout Washington. The Port of Seattle also supports Washington's growing cruise industry. Additionally, Port of Seattle facilities are critical for commercial fishing, providing facilities for fish processors, moorage for commercial fishing vessels, as well as a wide range of infrastructure that supports the commercial fishing industry. The Port of Seattle also operates recreational marinas, vessel moorage, a grain terminal, and industrial and non-industrial real estate for a diverse array of businesses.

SEA Airport

Key Asset to Washington Business

Firms of all sizes throughout Washington count on the connections that SEA Airport provides, allowing them to conduct business with their customers, vendors, and partners. In addition, the airport links businesses to the top

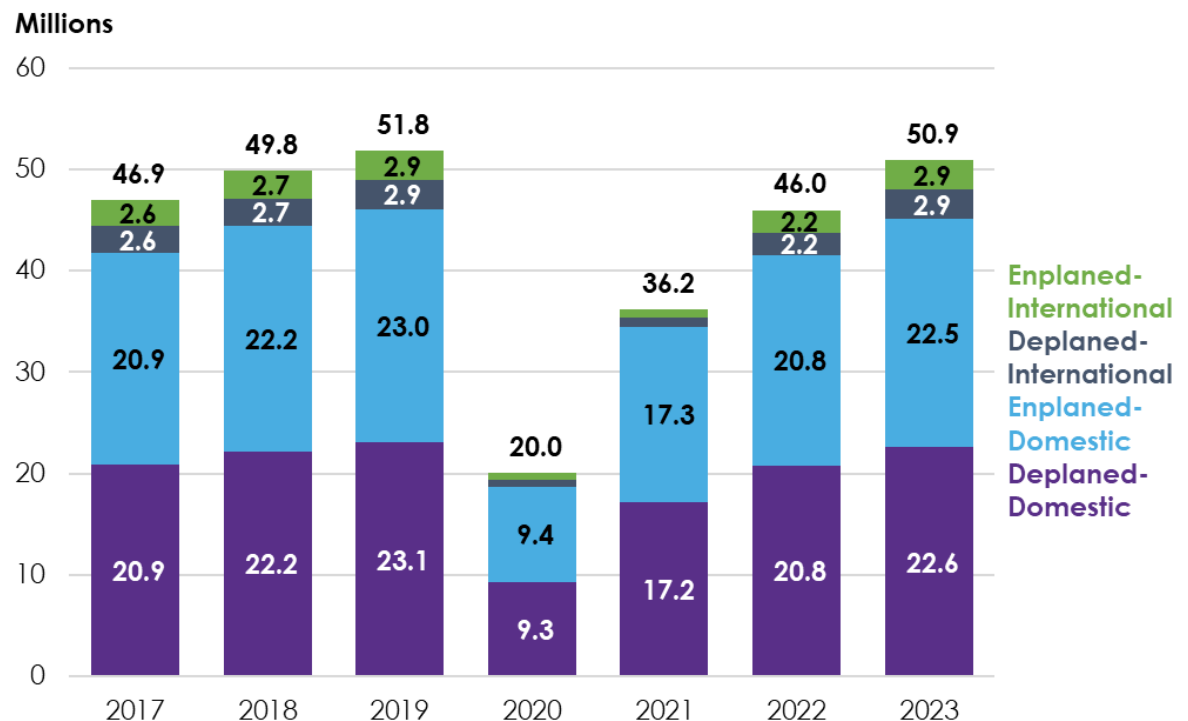
talent they recruit from around the globe. Washington’s export industries rely upon access to global markets, facilitated by the airport. The cherry industry remains a prime example of a Washington industry that depends on the airport to transport their goods to global markets.

In 2023, Washington produced roughly 208,000 tons of cherries, of which nearly 19,000 tons were exported through SEA. These exports support jobs, wages, and economic activity in some of Washington’s more rural communities in the Yakima Valley and Wenatchee areas.

Passenger Airlines and Services

The airport is served by 10 U.S.-flagged passenger airlines and 26 foreign-flagged passenger airlines as of March 2025. Passenger volume (including enplaning and deplaning) increased from 46 million in 2022 to 50.9 million in 2023, an increase of 10.7%, making SEA the 11th busiest airport in the United States by passenger volume (**Exhibit 47**). Approximately 9.5% of nearly 23.0 million departing passengers in 2023 were on international non-stop flights and 90.5% were on domestic flights.

Exhibit 47. SEA Airline Traffic, Passengers Enplaned and Deplaned, 2017–2023



Sources: Port of Seattle, 2024; Community Attributes Inc., 2025

Exhibit 48 shows the distribution of passenger volumes by airline in 2023. Alaska Airlines and Delta Air Lines carried an estimated 39 million

passengers to and from SEA, accounting for nearly 77% of the total passenger volume.

The status of SEA as a major hub for Alaska Airlines and Delta Air Lines is important not only for the national and global route connections that it enables, but for the volume of supporting economic activity that occurs at a hub airport facility. An airline “hub” refers to a strategically located airport where a carrier’s major facilities and operations are housed, and where most of its scheduled flights originate from or terminate at. Hub airports are the most efficient way of connecting many destinations and create economies of scale by pooling demand.

Exhibit 48. Passengers by Airline, SEA Airport, 2022 – 2023

Airline Name	Passengers		% Change from 2022
	2022	2023	
Alaska Airlines*	24,962,000	26,770,000	7.2%
Delta Air Lines*	11,190,000	12,372,000	10.6%
United Airlines*	2,240,000	2,548,000	13.7%
American Airlines*	1,912,000	2,224,000	16.3%
Southwest Airlines	2,180,000	2,133,000	-2.2%
Hawaiian Airlines	370,000	356,000	-3.9%
Frontier Airlines	165,000	349,000	111.4%
Air Canada*	251,000	347,000	38.5%
JetBlue Airways	240,000	320,000	33.6%
Spirit Airlines	258,000	315,000	22.0%
EVA Air	80,000	245,000	208.6%
British Airways	184,000	242,000	31.4%
Qatar Airways	201,000	235,000	17.2%
Emirates	184,000	201,000	9.1%
Korean Air	74,000	174,000	135.6%
Turkish Airlines	64,000	173,000	170.3%
Icelandair	157,000	172,000	9.5%
Asiana Airlines	77,000	153,000	98.9%
Lufthansa Airlines	130,000	138,000	5.9%
Volaris	114,000	135,000	18.2%
WestJet	72,000	134,000	86.3%
Aer Lingus	56,000	127,000	126.6%
Virgin Atlantic Airways	81,000	122,000	50.2%
Sun Country Airlines	99,000	121,000	21.7%
Other	622,000	778,000	25.1%
Total	45,964,000	50,885,000	10.7%

Sources: Port of Seattle, 2024; Community Attributes Inc., 2025.

*Note: These passenger numbers are rollups and include subsidiaries and regional partners' passenger volume data.

Passenger and freight operations require a large number of supporting services at the airport. This work within the passenger services category includes passenger check-in and ticketing, passenger boarding, airline lounge staffing, and baggage assistance. One example is Swissport International. The company operates three lines of business at SEA: fueling, ground handling, and cargo handling. Their ground handling division employs an estimated 800 people, 580 of whom are passenger service agents.

Concessionaires such as restaurants, bars, specialty shops, newspaper stands, and foreign exchange and travel insurance counters occupy leased space in SEA's terminal buildings. These in-terminal retail businesses

capture spending from both visitors to the region and connecting passengers and accordingly support local employment.

Passenger Airlines and Services businesses employed an estimated 7,000 workers at SEA in 2023. These businesses paid \$531 million in labor income to their employees and generated \$2.6 billion in business revenues.

Airport Services and Business-to-Business Vendors

The Airport Services and Business-to-Business Vendors category includes both government operations and private sector businesses. This category represents activities that do not involve direct customer engagement. Examples include the Port of Seattle Airport Division Staff, the U.S. Transportation Security Administration (TSA), baggage handling and other “back-end” ground handling activities, and airline catering services. **Exhibit 49** reports major employers under this category by airport employment.

Exhibit 49. Major Airport Services and Business-to-Business Vendors at SEA, 2023

Employer	Description of Services	Jobs
Alaska Airlines	Ground handling/cargo	2,300
Federal Agencies	Airport Services	1,700
Delta Air Lines	Ground handling/cargo	1,600
Port of Seattle	Administration	1,200
McGee Air Services	Ground handling/cargo	1,200
Worldwide Flight Services	Ground handling/cargo	900
Swissport	Passenger/ground handling/cargo	800
Unifi Aviation	Passenger/ground handling/cargo	700

Sources: Port of Seattle, 2024; Community Attributes Inc., 2025.

Note: Jobs numbers reflect total jobs for each business at SEA Airport. Only a portion of these jobs are related to ground handling and cargo, some of the total jobs are related to passenger service operations as well.

SEA Airport is owned and operated by the Port of Seattle under their Aviation Division. Airport operations are self-sustaining and do not rely on any local tax dollars. Funds are generated through various fees, such as landing fees and aviation fees, parking revenues, retail revenues, land lease and rental income, passenger facility charges, and federal grants. The Port of Seattle employs more than 1,200 people within the Aviation Division.

There are a number of federal agencies operating at SEA Airport to ensure the safety and security of the facility and its passengers. These include federal agencies such as the U.S. Transportation Security Administration (TSA), U.S. Customs and Border Protection (CBP), the Federal Aviation Administration (FAA), and the Federal Bureau of Investigation (FBI). Their activity is supplemented by state and local government agencies such as the Washington State Patrol. These government agencies perform essential

functions such as screening passengers, directing air traffic, and addressing any border-related issues for international travel.

Business-to-business vendors provide critical airline services between the point at which an aircraft arrives at a terminal gate and its next departure. This includes cabin service, catering, ramp service, fueling, and baggage handling. Alaska Airlines outsources its ground handling at SEA Airport to McGee Air Services.

Together, airport services and business-to-business vendors directly supported 8,000 jobs, \$666 million in labor income, and generated more than \$2.1 billion in business revenues in 2023.

Ground Transportation

Ground transportation includes car rentals, buses and shuttles, taxi services, rideshare services such as Uber and Lyft, and public transit. In 2023, gross revenues at rental car companies located at the airports rental car facility totaled an estimated \$390 million, with the highest sales achieved by EAN Holdings, LLC which includes brands such as Alamo, Enterprise, and National.

Exhibit 50. Reported Car Rental Gross Revenues, SEA Airport, 2023

Company	Revenues (millions)
EAN Holdings	\$127.7
Budget Rent A Car	\$63.4
Hertz Corporation	\$61.7
CMC Investments	\$55.7
Thrifty Car Rental	\$30.7
Sixt Rent A Car	\$24.9
Fox Rent-a-Car	\$21.2
Payless Car Rental	\$4.6
Total	\$389.8

Sources: Port of Seattle, 2024; Community Attributes Inc., 2025.

Contract Construction and Consulting Services

Capital investments by and related to SEA Airport provide an important stimulus to the local construction industry on an annual basis. The Port of Seattle's aviation division reported in the 2023 budget that \$4.6 billion in capital spending is planned for 2023 through 2027. Seven projects represent nearly half, \$2.1 billion, of the spending. These projects include:

- North Satellite Renovation & North Satellite Transit Station Lobbies
- Baggage Recapitalization and Optimization
- Main Terminal Improvements
- International Arrivals Facility

- C Concourse Expansion
- S Concourse Evolution
- SEA Gateway.

As of the 2025 budget, the Aviation Division estimates \$4.9 billion in capital plan spending from 2025 through 2029, which includes the baggage recapitalization and optimization, main terminal improvements, C concourse expansion, S concourse evolution, and SEA gateway projects listed previously.

There are a total of nine capital improvement projects underway. **Exhibit 51** below describes the largest four by estimated cost. Improvements focus on handling an increased passenger volume throughout all SEA Airport systems. In addition to the projects listed below, the airport is modernizing the underground subway loop, adding another security checkpoint, expanding the roadway up to the airport, and adding restrooms and other amenities to Concourses throughout the facility.

Exhibit 51. Large Capital Improvement Projects Underway at the SEA Airport

Project	Description	Cost (Estimated)	Timeline (Estimated)
S Concourse Evolution	The South Satellite Concourse, now renamed the S Concourse, is the hub for international passengers. To meet growing demand for international travel from the SEA Airport, the project will modernize building systems, improve earthquake resiliency, and add amenities, art, and design elements for passenger wellbeing and comfort.	\$1.9-2.2 Billion	2024-2038
Baggage Handling System Optimization	In collaboration with the Transportation Security Administration (TSA), the Port of Seattle is optimizing the outbound baggage handling system at the SEA Airport. The system will replace the current conveyor system that is aging, and will allow the airport to meet current and future demand.	\$955 Million	2017-2027
SEA Gateway Project	The SEA Gateway Project will reconfigure the terminal north end ticketing area, expand the security checkpoint, and create an updated, light-filled, open space to help passengers move quickly through the terminal.	\$546 Million	2022-2026
C Concourse Expansion	The project adds dining, retail, and needed amenities in addition to a new Alaska Airlines Lounge. In total, construction will add 145,000 square feet and turn the Concourse into a state-of-the-art facility.	\$399 Million	2023-2026

Source: Port of Seattle, 2025; Community Attributes, 2025.

In 2023, capital investments associated with SEA Airport directly supported an estimated 3,040 jobs, more than \$780 million in business revenue and \$250 million in wages.

Air Cargo

Air cargo or air freight represents three major stages of service: freight forwarding, ground handling, and air cargo service. Freight forwarding entails air cargo arrangements, logistics, and reserving of space on a freighter or belly of a passenger aircraft for cargo delivery. Ground handling includes on-site warehousing, movement, and loading and unloading of air cargo from aircraft. Air cargo service can be done by belly freight that is loaded onto a passenger aircraft, airline freighters, and express/integrated

freight operations which are vertically integrated and include freight forwarding, ground handling, and air cargo delivery services, such as FedEx.

Exhibit 52 presents the largest carriers of air freight transporting goods through SEA Airport by domestic and international freight. Domestic freight represented nearly 75% of all freight passing through SEA Airport in 2023. In the same year, FedEx and Air Transport International, two major international cargo shipping airlines, carried the largest volume of air freight, primarily carrying domestic freight. Together, they transported more than 225,000 metric tons of air freight, accounting for more than 54% of all air freight processed through SEA Airport in 2023.

Exhibit 52. Air Freight Carriers, SEA Airport, 2023

Airline	Air Freight Volume (metric tons)		
	Domestic	International	Total
Fedex	107,470	12,850	120,320
Air Transport Int'l	105,210	0	105,210
Alaska Airlines (rollup)	37,820	0	37,820
Delta Air Lines (rollup)	12,110	15,320	27,430
ABX Air	24,650	0	24,650
Korean Air	0	11,300	11,300
China Airlines	0	9,870	9,870
Cargolux	0	9,760	9,760
EVA Air	0	9,220	9,220
Asiana Airlines	0	5,630	5,630
British Airways	0	5,600	5,600
All Nippon Airways	0	5,120	5,120
Japan Airlines	0	4,880	4,880
Hawaiian Airlines	4,670	0	4,670
Southwest Airlines (rollup)	3,930	0	3,930
Other	9,210	22,430	31,650
Total Air Freight	305,070	111,980	417,060

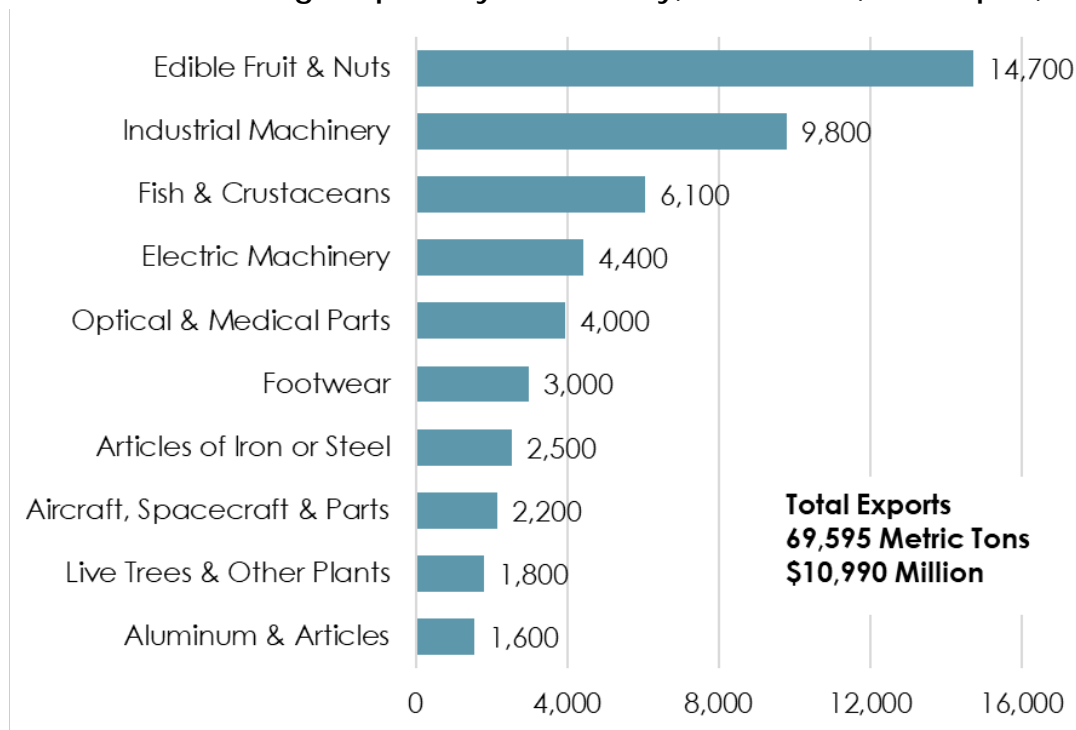
Sources: Port of Seattle, 2024; Community Attributes Inc., 2025.

The most exported air cargo commodities to pass through SEA Airport in 2023 included:

- Edible fruit & nuts - 14,700 metric tons
- Industrial machinery - 9,800 metric tons
- Fish & crustaceans - 6,100 metric tons
- Electric machinery - 4,400 metric tons.

In total, nearly 70,000 metric tons of exports were processed at SEA Airport, or more than \$17.8 billion of total export value.

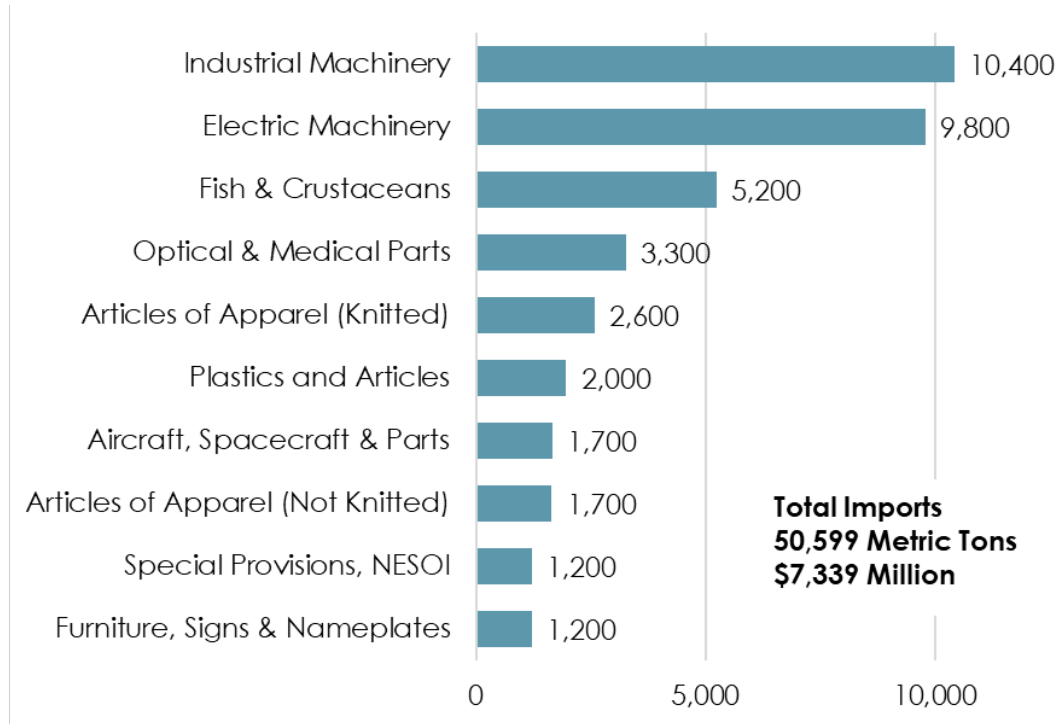
Exhibit 53. Air Cargo Exports by Commodity, Metric Tons, SEA Airport, 2023



Sources: USA Trade Data Online, U.S. Census Bureau; Community Attributes Inc., 2025.

Nearly 50,600 metric tons of imports were processed by SEA Airport in 2023 (**Exhibit 54**). Industrial machinery and electric machinery accounted for 40% of all imported commodities by weight, and nearly 58% of total import value. In total, more than \$7.3 billion commodity value in imports was handled through SEA Airport in 2023.

Exhibit 54. Air Cargo Imports by Commodity, Metric Tons, SEA Airport, 2023



Sources: Sources: USA Trade Data Online, U.S. Census Bureau; Community Attributes Inc., 2025.

Visitor Spending

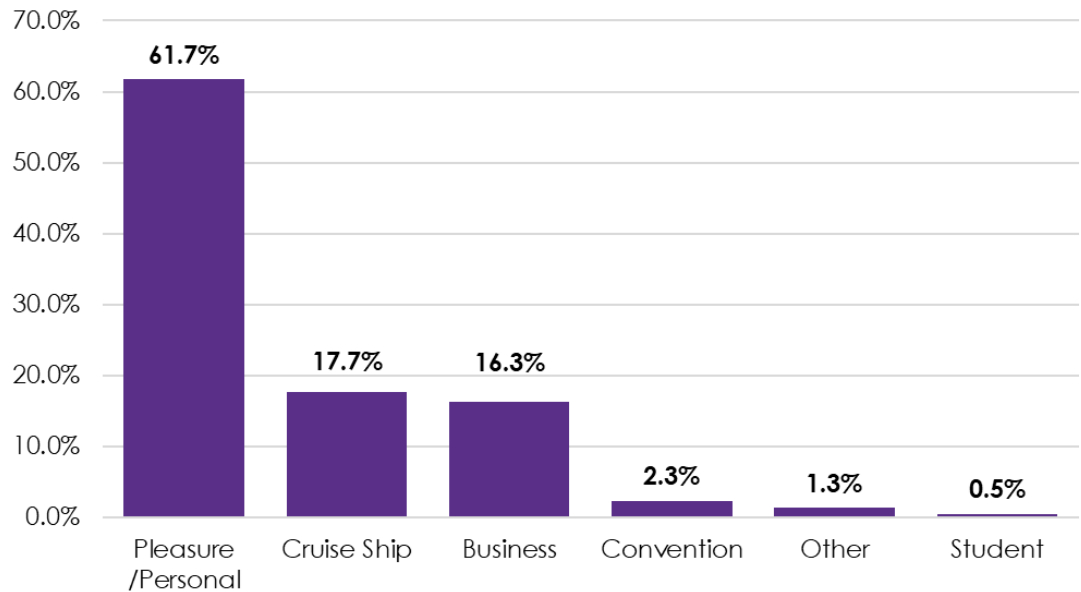
SEA Airport is the primary gateway to the Puget Sound region. Millions of visitors arrive at and depart from the airport annually. These visitors are non-residents whose final destinations are in Washington state. In this study, visitors do not include local residents who are returning home from a trip to another destination or passengers that are only passing through SEA making a connection to another flight.

In 2023, an estimated 11.2 million visitors arrived in Washington state through SEA Airport. Almost 90% of those visitors were domestic travelers while the rest were international travelers.

The Port of Seattle commissioned an in-terminal survey of departing passengers in SEA Airport to estimate the average visitor spending and the total economic impact of domestic and international spending in the region. This in-terminal passenger survey was conducted in September and October 2024 and yielded 1,062 responses.

The survey found that most visitors to the area are non-cruise leisure travelers (61.7%), followed by travelers who came to the region for a cruise (**Exhibit 55**).

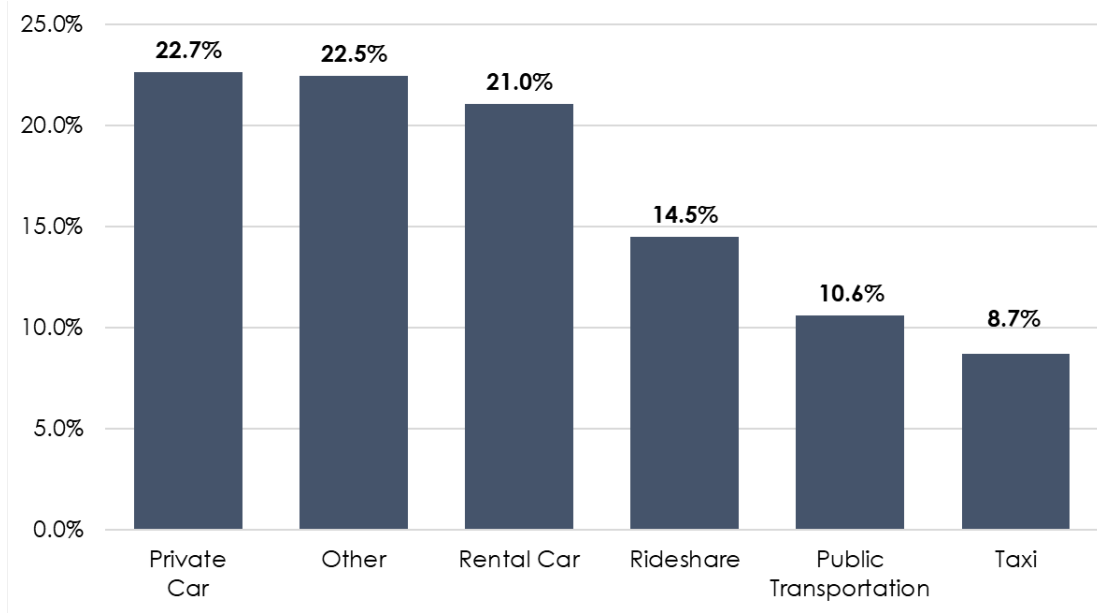
Exhibit 55. Purpose of Stay, 2024



Source: Port of Seattle, 2025; Community Attributes Inc., 2025

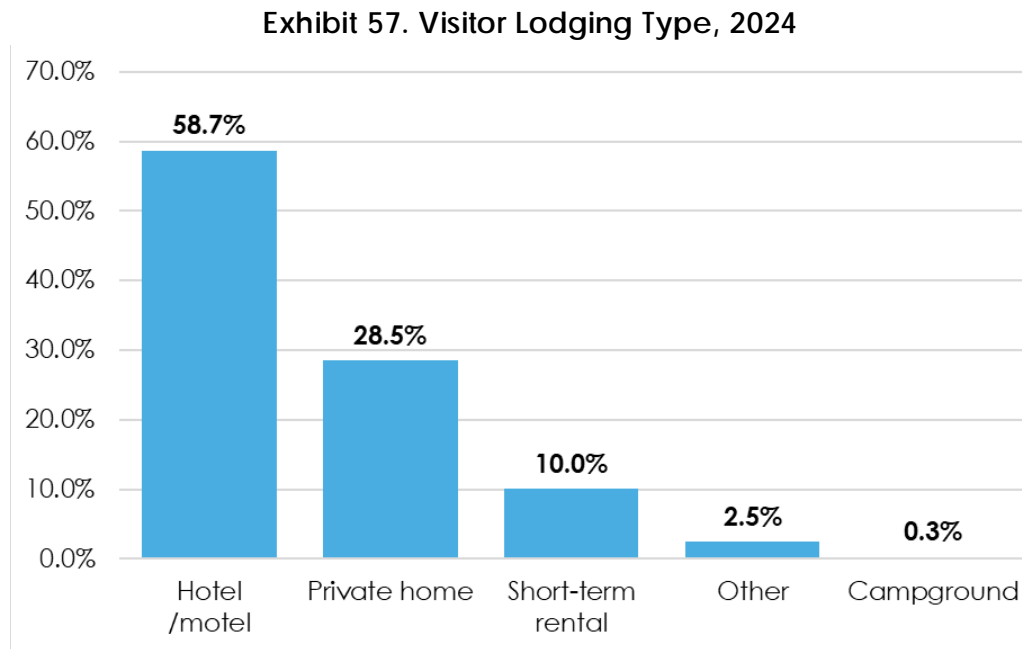
The survey also asked visitors how they traveled to SEA Airport. Cars remained the dominant mode of transportation, with nearly 22.7% of visitors traveling by private car, and another 22.5% traveling by an alternative method, usually a hotel or airport shuttle. In addition, 21.0% of visitors rented a car, 14.5% used rideshare apps such as Uber or Lyft, 10.6% used public transit to get to the airport, and 8.7% used a taxi service (**Exhibit 56**).

Exhibit 56. Visitor Transportation Mode to SEA Airport, 2024



Source: Port of Seattle, 2025; Community Attributes Inc., 2025

Based on survey results, 59% of respondents stayed at a hotel or motel, while 29% stayed at a private home, either including second residences or the home of family or friends (**Exhibit 57**). An additional 10% stayed at short-term rentals, such as Airbnb.



Source: Port of Seattle, 2025; Community Attributes Inc., 2025

International visitors tended to spend more than domestic visitors across all categories. On average, an international visitor spent \$1,685 per trip, while a domestic visitor spent \$869 per trip. Lodging and food and beverage were the categories with the highest spending, accounting for over half of total trip spending for both domestic and international visitors (**Exhibit 58**).

Exhibit 58. Average Spending per Person Off-Airport by Visitor Type and Expense Category, 2023

Category of Spending	Domestic Visitors	International Visitors	All Visitors
Lodging	\$361	\$467	\$376
Food/Beverage	\$243	\$582	\$289
Rental Car	\$71	\$159	\$83
Entertainment	\$70	\$138	\$79
Retail Purchases	\$92	\$248	\$113
In-Town Cabs or Rideshare	\$32	\$91	\$40
Total	\$869	\$1,685	\$979

Source: Port of Seattle Passenger Survey, 2024; Community Attributes Inc., 2025

Note: Spending is expressed per visitor and per trip.

Direct Impacts

On-Site Airport Activity

Employee counts provided by the Port of Seattle are one method of estimating direct jobs at the airport. The Port of Seattle maintains records of employees who work at the airport, both inside and outside security. This data does not capture ground transportation activities or passenger airline staff and crew who are not based in Seattle.

Port of Seattle employment data show that major employers at SEA Airport include Alaska Airlines and Delta Air Lines—SEA Airport serves as a hub for both airlines—as well as government employers such as the Port of Seattle Aviation Division and federal agencies, and ground handling services such as McGee Air Services, Worldwide Flight Services, and Swissport (**Exhibit 49**).

The organizations located at SEA Airport employed an estimated 21,190 people in 2023 (**Exhibit 59**). Approximately 80% of the jobs directly generated by on-site airport activity are concentrated in the airport services, airlines, and air cargo categories. The direct economic impact of on-site employment on the Washington state economy was \$6.5 billion in business revenue and nearly \$1.7 billion in labor income in 2023.

Exhibit 59. SEA Airport Direct Impact Estimates, 2023

Segment	Jobs	Business Revenue (mils 2023 \$)	Labor Income (mils 2023 \$)
On-site Airport Activity	21,190	\$6,539.0	\$1,694.4
Airport Services and Vendors	7,970	\$2,144.8	\$665.7
Passenger Airlines and Services	6,980	\$2,610.9	\$531.5
Contract Const. and Consulting	3,040	\$782.7	\$250.2
Air Cargo	2,500	\$930.0	\$228.0
Ground Transportation	700	\$70.6	\$19.0
Visitor Impacts	73,320	\$10,841.6	\$3,706.0
Total	94,510	\$17,380.5	\$5,400.3

Sources: Washington State Employment Security Department, 2025; Washington State Office of Financial Management, 2025; U.S. Bureau of Labor Statistics, 2025; Port of Seattle, 2025; Community Attributes Inc., 2025.

Visitor Impacts

Visitor impacts represent the jobs, total compensation, and business revenues supported through visitor spending on hotel accommodations and retail purchases. The economic impact of visitor spending depends on the amount and category of spending as well as the length of stay. On average visitors to Washington traveling through SEA Airport spent \$979 per trip. The 11.1 million visitors spent more than \$10.8 billion off-airport in 2023, excluding the spending by visitors traveling for a cruise, which are captured in the visitor spending supported by Seattle's cruise industry. Visitor

spending directly supported 73,320 jobs and approximately \$3.7 billion in labor income across the lodging, food/beverage, recreational and entertainment, transportation, and retail sectors.

Economic and Fiscal Impacts

Operations at SEA Airport and visitor spending supported a total of 174,950 jobs throughout the state of Washington in 2023 (**Exhibit 60**). Total compensation supported totaled nearly \$10.5 billion, and the SEA Airport supported nearly \$33.4 billion in business output throughout the State.

Exhibit 60. SEA Airport Total Economic Impacts, Washington, 2023

	Direct	Indirect	Induced	Total
On-site Airport Activity				
Jobs	21,190	8,150	17,580	46,920
Total Compensation (mils 2023 \$)	\$1,694.4	\$562.7	\$1,081.1	\$3,338.2
Business Output (mils 2023 \$)	\$6,539.0	\$2,156.0	\$3,268.0	\$11,963.0
Visitor Impacts				
Jobs	73,320	16,990	37,720	128,030
Total Compensation (mils 2023 \$)	\$3,706.0	\$1,137.4	\$2,320.1	\$7,163.5
Business Output (mils 2023 \$)	\$10,841.6	\$3,553.6	\$7,013.1	\$21,408.3
Total Impacts				
Jobs	94,510	25,140	55,300	174,950
Total Compensation (mils 2023 \$)	\$5,400.3	\$1,700.1	\$3,401.3	\$10,501.7
Business Output (mils 2023 \$)	\$17,380.5	\$5,709.6	\$10,281.1	\$33,371.3

Note: Visitor impacts of SEA Airport exclude the spending of visitors traveling for a cruise, which are captured in the visitor impacts of cruise.

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Activity at the airport and visitor spending throughout Washington supported nearly \$342 million in estimated tax revenue to the state, approximately \$243 million of which came from visitor spending. Business and occupation taxes totaled \$161 million, sales and use taxes revenues were valued at \$158 million, while other taxes totaled \$22 million in 2023.

Exhibit 61. SEA Airport Total Fiscal Impacts, Washington, 2023

	Direct	Secondary	Total
On-site Airport Activity			
B&O	\$14.8	\$27.3	\$42.1
Sales & Use Taxes	\$0.3	\$48.4	\$48.7
Other	\$0.0	\$7.7	\$7.7
Total	\$15.1	\$83.4	\$98.5
Visitor Impacts			
B&O	\$61.6	\$57.7	\$119.3
Sales & Use Taxes	\$2.5	\$107.3	\$109.8
Other	\$0.0	\$13.9	\$13.9
Total	\$64.0	\$178.9	\$243.0
Total			
B&O	\$76.4	\$85.0	\$161.3
Sales & Use Taxes	\$2.8	\$155.7	\$158.4
Other	\$0.0	\$21.7	\$21.7
Total	\$79.1	\$262.3	\$341.5

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

SEA Airport supports local economic and fiscal impacts through its onsite operations and visitor spending throughout the region. Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

The City of SeaTac also has a parking tax, which is a special local-option transportation tax for parking in commercial parking areas within the city. This tax is adjusted annually and charged per transaction. Based on information in the City of SeaTac's 2025-2026 Adopted Budget, parking taxes for fiscal year 2023 were more than \$11 million.

Exhibit 62 and **Exhibit 63** highlights city-level economic and fiscal impacts supported by on-site airport activities and SEA Airport visitor spending, respectively. SeaTac saw the highest level of supported jobs, business output, and total compensation generated by on-site airport activities in 2023.

Exhibit 62. SEA Airport On-Site Airport Activity Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023, Millions

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
SeaTac	21,470	\$6,625.5	\$1,721.6	\$16.57	\$0.71	\$17.28
Seattle	4,040	\$771.8	\$261.1	\$13.25	\$7.07	\$20.32
Tacoma	1,350	\$253.8	\$85.5	\$4.36	\$2.09	\$6.45
Kent	1,170	\$275.3	\$80.3	\$4.73	\$2.13	\$6.86
Federal Way	1,020	\$181.4	\$63.1	\$3.11	\$1.12	\$4.23
Tukwila	900	\$182.8	\$57.8	\$3.14	\$1.27	\$4.41
Auburn	850	\$181.0	\$56.0	\$3.12	\$1.35	\$4.46
Renton	770	\$184.3	\$50.9	\$3.16	\$1.37	\$4.53
Bellevue	670	\$125.5	\$43.8	\$2.15	\$0.98	\$3.13
Puyallup	630	\$115.5	\$39.7	\$1.98	\$0.71	\$2.70

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Seattle and Tacoma are estimated to have the highest level of supported jobs, business output, and total compensation generated by airport related visitor spending in 2023 (**Exhibit 63**).

Exhibit 63. SEA Airport Visitor Spending Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Seattle	22,040	\$3,459.3	\$1,188.3	\$34.48	\$17.80	\$52.28
Tacoma	13,550	\$2,082.3	\$705.0	\$16.24	\$6.47	\$22.72
Bellevue	5,540	\$821.8	\$326.1	\$8.05	\$3.14	\$11.19
SeaTac	4,750	\$724.0	\$222.5	\$5.28	\$0.65	\$5.93
Tukwila	2,570	\$402.0	\$120.7	\$3.21	\$0.81	\$4.02
Bothell	2,530	\$363.6	\$145.3	\$2.83	\$0.42	\$3.25
Redmond	2,200	\$344.0	\$134.6	\$3.91	\$1.08	\$4.99
Kent	1,880	\$342.0	\$104.1	\$4.32	\$1.81	\$6.13
Sammamish	1,870	\$273.3	\$108.4	\$2.43	\$0.48	\$2.90
Woodinville	1,580	\$228.5	\$91.2	\$1.67	\$0.20	\$1.87

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Exhibit 64 presents the total economic and fiscal impact among the six cities closest to SEA Airport. Economic and fiscal impacts represent the combined impacts of on-site airport activity and visitor spending.

Exhibit 64. SEA Airport Total Economic and Fiscal Impacts, Cities Near Airport, 2023

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
SeaTac	26,220	\$7,349.5	\$1,944.0	\$21.85	\$1.36	\$23.20
Tukwila	3,470	\$584.8	\$178.5	\$6.35	\$2.08	\$8.43
Federal Way	2,120	\$358.9	\$121.5	\$6.23	\$2.24	\$8.47
Des Moines	1,550	\$251.8	\$82.3	\$3.54	\$1.69	\$5.23
Burien	710	\$115.0	\$37.9	\$0.49	\$0.23	\$0.72
Normandy Park	245	\$39.0	\$12.8	\$0.56	\$0.20	\$0.77

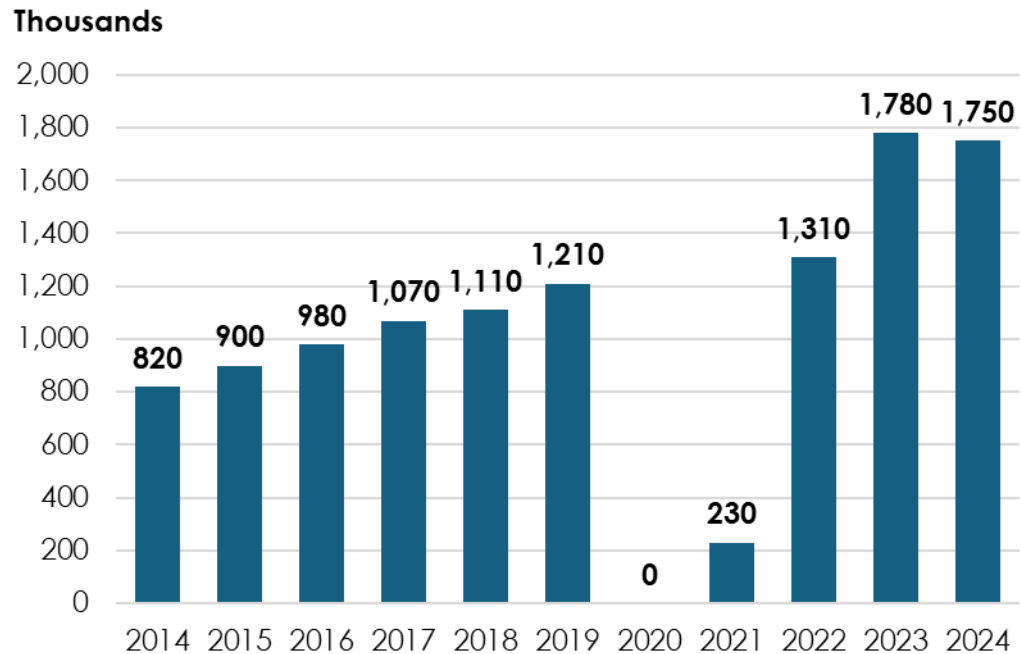
Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Cruise

In 2024, the Port of Seattle hosted 275 cruise line calls, and is projected to host 300 calls in the 2025 cruise season. **Exhibit 65** outlines the total number of embarked, disembarked, and in transit cruise passengers from 2014 through 2024. No cruises took place in 2020 due to the COVID-19 pandemic and 2021 saw only a partial cruise season. However, by 2022, the number of cruise passengers traveling through the Port of Seattle surpassed pre-2020 levels. This increase was largely driven by an increase in annual vessel calls. From 2014 through 2019, the Port of Seattle averaged 203 cruise ship calls per year, whereas from 2022 to 2024, the average increased to 284 calls. Between 2014 and 2024 total cruise passenger traffic at the Port of Seattle grew by 8% annually, on average.

Exhibit 65. Port of Seattle Cruise Passengers, 2014 - 2024



Sources: Port of Seattle, 2024; Community Attributes Inc., 2025.

Analysis presented in this section draws on data collection on 2023 cruise activities. This data was then used to develop a cruise industry impact model capturing the various types of impacts of cruise operations to the region, such as cruise ship local procurement, onshore services, and cruise passenger onshore spending before and after a cruise. This model was then applied to the 2024 cruise schedule and the projected 2025 cruise schedule using the expected number of vessel calls and passengers. Cruise industry impacts are disaggregated by 1) cruise passenger spending on local goods and services; 2) crew expenditures in the local economy; and 3) cruise operations including payroll, procurement from local vendors, and onshore services. The impact to Washington of crew onboard cruise ships is limited to their expenditures in the local economy and only a small portion of total crew disembark to visit the region during any vessel call.

In 2023, the McKinley Research Group conducted a survey of Alaska cruise passengers about their experiences in Seattle before and after their cruise. More than half of the surveyed passengers spent at least one night in Seattle, primarily before their scheduled departure. On average, each party spent a total of \$569 (**Exhibit 66**), with the majority of spending both pre- and post-cruise allocated to lodging and food and beverage.

Exhibit 66. Average Passenger Spending per Party, Cruise Passengers, 2023

Category	Pre-Cruise	Post-Cruise
Lodging	\$215	\$61
Food and Beverage	\$86	\$45
Rental Car, Gas, Taxi, Shuttles, Rideshare	\$51	\$31
Gifts, Souvenirs, Clothing	\$24	\$11
Tours, Activities, Entertainment	\$25	\$14
Other	\$4	\$2
Total Average Spending	\$405	\$164

Sources: Port of Seattle Alaska Cruise Passenger Survey, 2023; Community Attributes Inc., 2025.

Passengers were also asked about their lodging plans before and after their cruise (**Exhibit 67**). Most non-residents chose to stay either downtown or near the airport, with some noting they would stay in different locations before and after their cruise.

Exhibit 67. Passenger Lodging Location, Cruise Passengers, 2023

Location	Share
Downtown	62%
Near airport	33%
Bellevue/Redmond	2%
Northgate/Lynnwood	2%
University District	1%
Everett	1%
Marysville	1%
Tacoma	1%
Other	2%
Don't know/refused	9%

Sources: Port of Seattle Alaska Cruise Passenger Survey, 2023; Community Attributes Inc., 2025. NOTE: Total share is greater than 100% due to passengers staying in multiple locations

Exhibit 68 presents the projected direct impacts for the 2025 cruise season based on the most recently published cruise schedule. Projected spending by cruise line visitors in 2025 is estimated to directly generate nearly \$166 million in business output and will support an estimated 1,580 jobs, and nearly \$71 million in labor income (**Exhibit 68**).

Cruise staff also generate impacts in the local economy through their local spending. Between vessel debarkations and embarkations at homeport and port of call visits, a small proportion of cruise crew spend their earned income on food and beverage, souvenirs, and entertainment. Crew spending

in 2025 is estimated to generate \$8.3 million in output, support 110 jobs, and \$4.9 million in compensation in Washington (**Exhibit 68**).

In 2025, cruise operation expenditures, including fuel, food and beverage procurement, various onboard accommodation purchases, and maintenance are estimated to sum to \$354 million. Various onshore operations provide services for cruises, such as onshore cruise line staff handling boarding and baggage, longshoremen, and Port of Seattle personnel. Additionally, tugboat companies provide inner harbor tug assists along with various maritime support services. In total, the onshore operations supported by the cruise industry in 2025 are estimated to generate business output of nearly \$82 million.

**Exhibit 68. Port of Seattle Cruise Operations Projected Direct Impact
Estimates by Economic Activity, Washington, 2025**

Activity	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Passenger Spending	1,580	\$165.9	\$70.8
On Shore Staff	330	\$81.5	\$29.4
Maritime Services	160	\$47.7	\$17.9
Maintenance	120	\$47.0	\$14.5
Crew Spending	110	\$8.3	\$4.9
Provisioning	60	\$113.3	\$4.7
Fuel	20	\$194.2	\$1.6
Total	2,380	\$657.8	\$143.9

Sources: Port of Seattle, 2025; Norwegian Cruise Lines, 2025; Caribbean Cruise Lines, 2025; McKinley Group, 2025; Washington State Department of Revenue, 2025; Washington State Employment Security Department, 2025; Washington State Office of Financial Management, 2025; Puget Sound Regional Council, 2025; Community Attributes Inc., 2025.

The Port of Seattle’s cruise operations are projected to support 5,120 jobs in 2025. In 2025 the cruise industry is projected to support nearly \$1.25 billion in business output. Total compensation is projected to total \$327 million in 2025 (**Exhibit 69**).

**Exhibit 69. Port of Seattle Cruise Operations Projected Total Economic
Impacts, Washington, 2025**

	Direct	Indirect	Induced	Total
Jobs	2,380	1,020	1,720	5,120
Total Compensation (mils 2023 \$)	\$143.9	\$76.9	\$105.8	\$326.6
Business Output (mils 2023 \$)	\$657.8	\$247.1	\$319.8	\$1,224.7

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

In 2025, it is projected that the Port of Seattle’s cruise operations will support more than \$11 million in state tax revenues (**Exhibit 70**).

Exhibit 70. Port of Seattle Cruise Operations Projected Total Fiscal Impacts, Washington, 2025

	Direct	Secondary	Total
B&O	\$2.4	\$2.9	\$5.3
Sales & Use Taxes	\$0.0	\$5.1	\$5.2
Other	\$0.0	\$0.7	\$0.7
Total	\$2.4	\$8.7	\$11.1

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Cruise activities supported by the Port of Seattle support economic and fiscal impacts throughout the region through cruise operations and the spending of cruise visitors. **Exhibit 71** shows total economic impacts including direct, indirect, and induced impacts represented by jobs, business output, and total compensation at the city level. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city. The City of SeaTac also has a parking tax, not included in this chart, which is charged per transaction and generated more than \$11 million in revenue for the City in 2023.

Exhibit 71. Port of Seattle Cruise Operations Projected Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2025

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Seattle	2,220	\$415.0	\$165.5	\$3.03	\$1.84	\$4.86
SeaTac	270	\$31.0	\$23.9	\$0.24	\$0.06	\$0.30
Federal Way	160	\$25.8	\$8.9	\$0.28	\$0.08	\$0.36
Tacoma	140	\$32.2	\$9.2	\$0.40	\$0.19	\$0.59
Tukwila	130	\$27.9	\$7.8	\$0.18	\$0.05	\$0.23
Kent	130	\$49.3	\$10.0	\$0.48	\$0.21	\$0.70
Bellevue	120	\$24.6	\$7.8	\$0.30	\$0.13	\$0.44
Renton	100	\$42.1	\$7.5	\$0.38	\$0.15	\$0.53
Auburn	70	\$25.0	\$5.4	\$0.31	\$0.12	\$0.44
Uninc. Pierce	70	\$19.8	\$4.7	\$0.21	\$0.05	\$0.26

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025. Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Commercial Fishing

The Port of Seattle owns and operates three facilities that serve as core assets for the regional fishing industry with Fishermen’s Terminal and Terminal 91 serving as the primary long-term moorage facilities and the Maritime Industrial Center serving as an additional short-term and daily moorage facility. These facilities support a range of commercial fishing vessels fishing in Washington and Alaskan fisheries. Fishing vessels of all types utilize Port of Seattle facilities, including seiners, crabbers, trollers, trawlers, longliners, and gillnetters in addition to other fishing vessel types.

To support the ongoing operations of these vessels, various businesses are located within the Port of Seattle’s Fishermen’s Terminal, Terminal 91, and Maritime Industrial Center. The ecosystem of businesses supporting the commercial fishing and maritime industry overall are located beyond Port of Seattle facilities throughout the Puget Sound Region, with concentrations in the Ballard and SODO neighborhoods of Seattle. These support businesses include equipment wholesalers, maritime associations and service providers, on-dock mechanics and maintenance, and other businesses critical to serving the commercial fishing industry.

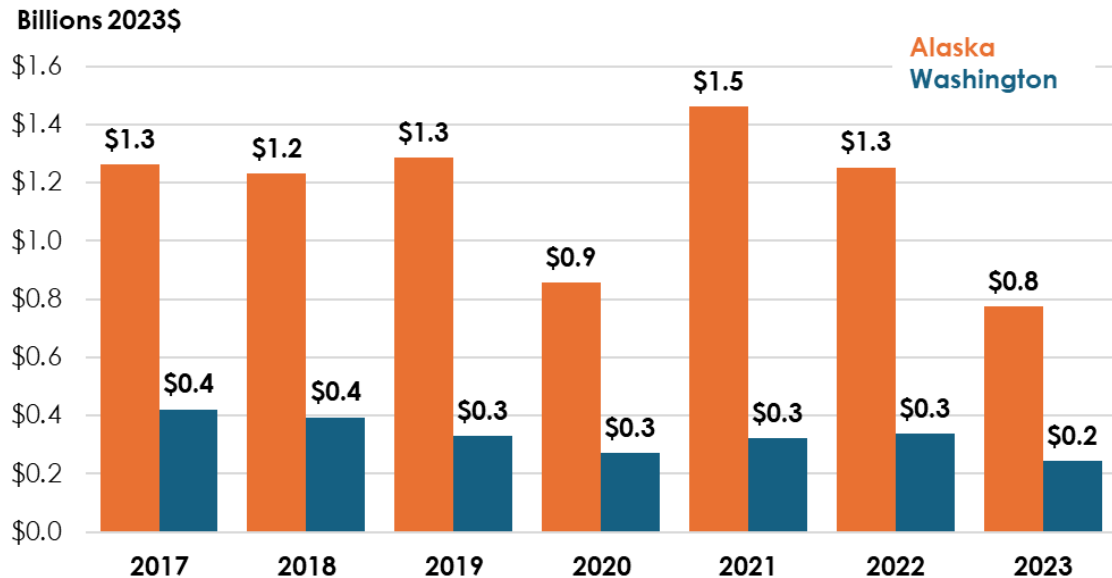
The commercial fishing industry also relies on seafood processing and cold storage operations taking place within the Port of Seattle, in addition to the NWSA’s trade operations. In addition to using at-sea processors and Alaskan based processing plants, seafood harvested in Alaskan fisheries will come to Seattle for processing and temporary storage. Additionally, processed seafood will travel through the NWSA in preparation for distribution domestically and internationally. In 2023, the Alaskan Seafood Marketing Institute reported that an estimated half a billion pounds of Alaskan seafood products are shipped by sea to Seattle and Tacoma each year to allow for more competitive rates on northbound freight.⁶

The Port of Seattle supports the commercial fishing industry by providing moorage and support services located within Port owned and operated properties. Since 2017, total revenue from these fisheries has declined, which is reflected in revenues generated by commercial fishing vessels utilizing Port of Seattle facilities. The Alaskan commercial fishing industry was particularly impacted, seeing total earnings decreasing by \$700 million from 2021 to 2023 despite total lands in pounds remaining similar (**Exhibit 72**). The large decline in earnings is largely attributed to decreased prices, while the industries’ decrease in overall profitability is attributed to increasing

⁶ “Alaska Seafood: Overview of Global Supply Chain”, Alaska Seafood Marketing Institute and McKinley Research, March 2023.

wages within the industry, higher energy prices, higher interest rates, increased international competition, and shifting consumer behavior.⁷

Exhibit 72. Total Earnings by Fishery, Alaska and Washington, 2017 – 2023



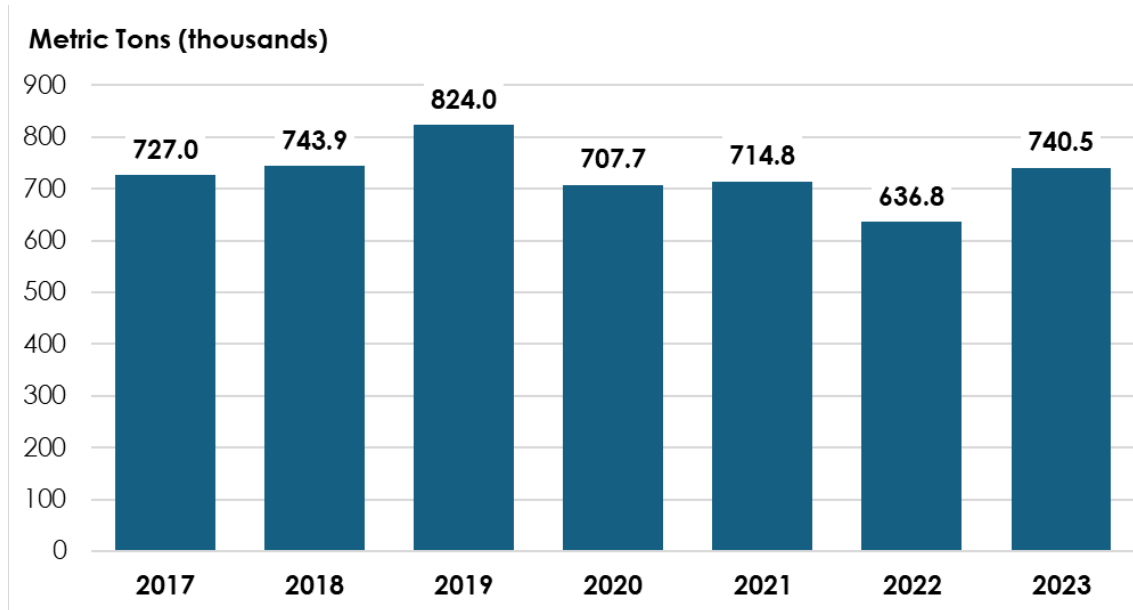
Sources: Commercial Fishing Entry Commission, 2025; NOAA, 2025; Community Attributes Inc., 2025.

In 2023, 275 commercial fishing vessels used Port of Seattle facilities. Roughly 75%, or 209, of these fishing vessels were identified as actively participating in Alaskan fisheries, though many also likely operate in Washington and Oregon during the Alaskan off-season. For example, vessels fishing in the Alaskan pollock fisheries typically participate in Season A, which runs from January through roughly April, then shift to Pacific whiting fisheries in Washington and Oregon before returning for pollock Season B, which begins in May or June. Roughly 60 additional commercial fishing vessels operating elsewhere were identified to have used Port of Seattle facilities in 2023. The analysis assumes the remaining 60 vessels primarily fished in Washington fisheries.

Exhibit 73 presents the total metric tons landed in Alaskan Fisheries from 2017 through 2023 by customers of the Port of Seattle in 2023. In 2023, Port of Seattle customers landed 740,000 metric tons of fish in Alaskan Fisheries.

⁷ “Economic Snapshot Shows Alaska Seafood Industry Suffered \$1.8 Billion Loss 2022-2023”, NOAA, October 9, 2024.

Exhibit 73. Metric Tons Landed by Vessels Using Port of Seattle Facilities in 2023, Alaskan Fisheries, 2017 - 2023



Sources: Alaska Commercial Fishing Entries Commission, 2025; Community Attributes Inc., 2025.

In total, commercial fishing at the Port of Seattle directly supported nearly 5,800 jobs, \$418 million in business revenues, and \$293 million in labor income in 2023. The majority of these impacts stem from commercial fishing vessels, which accounted for more than 4,400 jobs, \$294 million in revenues, and \$160 million in labor income (**Exhibit 74**).

Exhibit 74. Port of Seattle Commercial Fishing Direct Impact Estimates, Washington, 2023

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Commercial Fishing Vessels	4,420	\$293.7	\$159.9
Alaskan Fisheries	3,840	\$255.5	\$136.6
Non-Alaskan Fisheries	580	\$38.2	\$23.3
Port Tenants	1,210	\$112.8	\$123.0
Port of Seattle	140	\$11.6	\$10.1
Total	5,770	\$418.2	\$293.0

Sources: Port of Seattle, 2025; Puget Sound Regional Council, 2025; NOAA, 2025; Alaska Department of Fish and Game, 2025; Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

Throughout the Washington economy, the commercial fishing industry operating at Port of Seattle facilities supported nearly 8,800 jobs, more than \$480 million in total compensation, and more than \$1.0 billion in business output in 2023 (**Exhibit 75**).

**Exhibit 75. Port of Seattle Commercial Fishing Total Economic Impacts,
Washington, 2023**

	Direct	Indirect	Induced	Total
Jobs	5,770	470	2,550	8,790
Total Compensation (mils 2023 \$)	\$293.0	\$34.5	\$156.9	\$484.4
Business Output (mils 2023 \$)	\$418.2	\$145.9	\$474.2	\$1,038.3

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

The Port of Seattle’s commercial fishing operations are estimated to have supported nearly \$11 million in state tax revenues in 2023 (**Exhibit 76**).

**Exhibit 76. Port of Seattle Commercial Fishing Total Fiscal Impacts,
Washington, 2023**

	Direct	Secondary	Total
B&O	\$0.9	\$3.3	\$4.2
Sales & Use Taxes	\$0.0	\$5.7	\$5.7
Other	\$0.0	\$0.8	\$0.8
Total	\$0.9	\$9.8	\$10.7

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Commercial fishing activities supported by the Port of Seattle support economic and fiscal impacts throughout the region. **Exhibit 77** shows total economic impacts including direct, indirect, and induced impacts represented by jobs, business output, and total compensation by city. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city.

Exhibit 77. Port of Seattle Commercial Fishing Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Seattle	1,970	\$240.7	\$173.6	\$2.32	\$1.43	\$3.75
Tacoma	160	\$28.9	\$9.9	\$0.51	\$0.24	\$0.75
Kent	140	\$28.0	\$8.8	\$0.49	\$0.22	\$0.72
Federal Way	120	\$20.5	\$7.2	\$0.36	\$0.13	\$0.49
Renton	100	\$21.7	\$6.7	\$0.38	\$0.17	\$0.55
Puyallup	100	\$18.3	\$6.4	\$0.32	\$0.12	\$0.44
Auburn	90	\$16.9	\$5.5	\$0.30	\$0.13	\$0.43
Bonney Lake	50	\$9.2	\$3.2	\$0.16	\$0.05	\$0.21
Bellevue	50	\$9.7	\$3.5	\$0.17	\$0.08	\$0.25
Gig Harbor	30	\$4.5	\$1.6	\$0.08	\$0.02	\$0.10

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Recreational Marinas and Vessel Moorage

The Port of Seattle owns and operates four recreational marinas: Bell Harbor, Harbor Island, Salmon Bay, and Shilshole Bay, as well as offering some recreational moorage access at Fishermen’s Terminal.

In addition to providing moorage for recreational vessels, the Port of Seattle’s marinas support a broader ecosystem of businesses and tourist attractions, including restaurants, retail, and educational institutions. Shilshole Bay Marina, the Port’s largest by capacity, is located near popular destinations such as the Ballard Locks and the National Nordic Museum. Bell Harbor Marina sits in the heart of Seattle’s waterfront, offering convenient access to the area’s many dining, shopping, and visitor attractions.

Recreational and other vessels generate indirect impacts through spending at the broad ecosystem of maritime businesses at the Port of Seattle and throughout the region. These businesses include boat yards, engine mechanics, boat dealers, boating supply stores, and more.

In 2023, moorage for recreational vessels and related activities supported nearly 515 jobs, \$59 million in business revenues, and \$42 million in labor income across Port tenants involved in recreational boating, as well as Port of Seattle operations linked to its recreational marinas (**Exhibit 78**).

**Exhibit 78. Port of Seattle Recreational Marinas Direct Impact Estimates,
Washington, 2023**

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Recreational Marinas	105	\$15.9	\$9.8
Port of Seattle Staff	410	\$42.6	\$32.5
Total	515	\$58.5	\$42.3

Sources: Port of Seattle, 2025; Puget Sound Regional Council, 2025; Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

The Port of Seattle’s recreational marinas supported more than 1,000 jobs in the Washington economy in 2023. Total labor compensation supported by the Port’s recreational marinas totaled nearly \$74 million and supported business output totaled nearly \$154 million (**Exhibit 79**).

**Exhibit 79. Port of Seattle Recreational Marinas Total Economic Impacts,
Washington, 2023**

	Direct	Indirect	Induced	Total
Jobs	515	110	390	1,015
Total Compensation (mils 2023 \$)	\$42.3	\$7.4	\$23.8	\$73.5
Business Output (mils 2023 \$)	\$58.5	\$23.3	\$71.9	\$153.8

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Total fiscal impacts supported by the Port of Seattle’s recreational marinas totaled nearly \$2.0 million in 2023 for the State of Washington (**Exhibit 80**).

**Exhibit 80. Port of Seattle Recreational Marinas Total Fiscal Impacts,
Washington, 2023**

	Direct	Secondary	Total
B&O	\$0.2	\$0.6	\$0.8
Sales & Use Taxes	\$0.0	\$1.0	\$1.0
Other	\$0.0	\$0.1	\$0.1
Total	\$0.2	\$1.6	\$1.9

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

The Port of Seattle’s recreational marinas and vessel moorage support economic and fiscal impacts throughout the region through recreational marina activities, as well as the downstream impacts of the workers on their local economies. **Exhibit 81** presents the total economic and fiscal impacts associated with recreational marinas by city. Total economic impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic

activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city

Exhibit 81. Port of Seattle Recreational Marinas Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Seattle	620	\$78.0	\$49.4	\$0.61	\$0.35	\$0.97
Tacoma	30	\$4.6	\$1.6	\$0.09	\$0.04	\$0.13
Kent	20	\$3.9	\$1.3	\$0.07	\$0.03	\$0.10
Federal Way	20	\$3.2	\$1.1	\$0.06	\$0.02	\$0.08
Renton	20	\$3.0	\$1.0	\$0.06	\$0.02	\$0.08
Puyallup	20	\$2.8	\$1.0	\$0.05	\$0.02	\$0.07
Auburn	10	\$2.4	\$0.8	\$0.05	\$0.02	\$0.07
Bellevue	10	\$2.1	\$0.8	\$0.04	\$0.02	\$0.06
Bonney Lake	10	\$1.4	\$0.5	\$0.03	\$0.01	\$0.03
Redmond	10	\$1.1	\$0.4	\$0.02	\$0.01	\$0.03

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Tenants and other Businesses

Beyond the operations of the airport, cruise operations, commercial fishing, recreational marinas, the Port of Seattle is also home to an extensive portfolio of real estate assets and tenants. These activities range from the grain facility at Terminal 86, non-maritime industrial and non-industrial tenants, and vessel moorage for barge and tug tenants.

Port of Seattle properties support hundreds of tenants and customers engaged in both maritime and non-maritime activities. These include retailers, restaurants, service providers, research vessels, barge and tug companies, and bulk freight operators, among others.

Barge and tug operators at the Port provide both inter-harbor and long-distance transportation of non-containerized cargo, such as building materials for marine construction, shipments to Alaska, and industrial equipment.

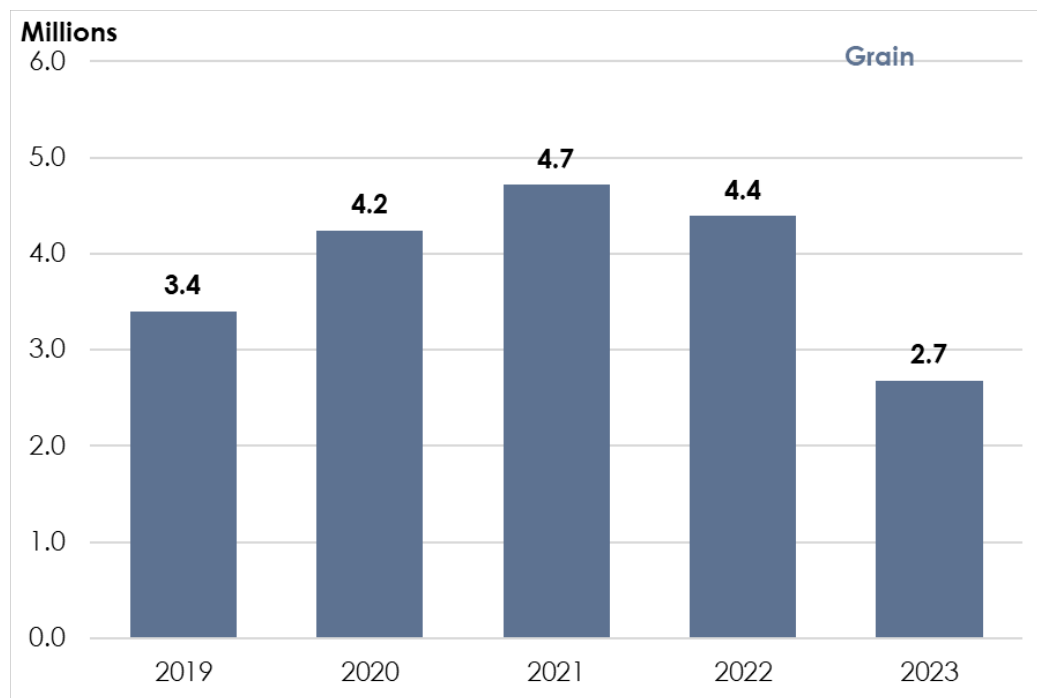
Research vessels also rely on the Port's facilities for seasonal moorage and essential maintenance between missions. In 2023, these included five National Oceanic and Atmospheric Administration (NOAA) vessels, two

University of Washington vessels, and one vessel operated by the University of Alaska Fairbanks. These ships conduct research ranging from ocean mapping to fisheries support.

In addition to maritime support activities, the Port of Seattle owns and leases industrial lands to non-maritime tenants. These tenants include local manufacturers, retail businesses, restaurants, and warehousing operations for non-containerized cargo.

The only marine cargo to be managed by the Port of Seattle between 2019 and 2023 was grain, with 2.7 million metric tons processed in 2023. (**Exhibit 82**).

Exhibit 82. Other Marine Cargo by Type, Metric Tons, Port of Seattle, 2019-2023



Sources: Port of Seattle, 2024; The Northwest Seaport Alliance, 2024; Community Attributes Inc., 2025.

In 2023, Port of Seattle tenants and businesses not captured in direct impacts of other Port of Seattle and marine cargo businesses directly supported approximately 6,550 jobs, nearly \$1.5 billion in business revenue, and \$663 million in labor income, representing the remainder of the direct economic impacts generated by the Port of Seattle and its tenants (**Exhibit 83**).

**Exhibit 83. Port of Seattle Tenants and Other Business Direct Impact
Estimates, Washington, 2023**

Segment	Jobs	Business Output (mils 2023\$)	Labor Income (mils 2023\$)
Port of Seattle Tenants	4,780	\$991.2	\$446.7
Port of Seattle Staff	480	\$65.9	\$32.3
Vessel Moorage and Barge and Tug Tenants	730	\$119.8	\$107.9
Bulk Cargo Operations	560	\$281.6	\$75.8
Total	6,550	\$1,458.5	\$662.7

Sources: Port of Seattle, 2025; Puget Sound Regional Council, 2025; PMA, 2025; Washington State Employment Security Department, 2025; Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

The Port of Seattle's other operations, encompassing real estate, bulk operations, and other vessel moorage and barge and tug tenants supported roughly \$3.1 billion in business revenues, \$1.2 billion in total compensation, and more than 15,000 jobs in 2023 throughout Washington State (**Exhibit 84**).

**Exhibit 84. Port of Seattle Tenants and Other Business Total Economic
Impacts, Washington, 2023**

	Direct	Indirect	Induced	Total
Jobs	6,550	2,110	6,360	15,020
Total Compensation (mils 2023 \$)	\$662.7	\$154.4	\$391.4	\$1,208.5
Business Output (mils 2023 \$)	\$1,458.5	\$502.6	\$1,183.1	\$3,144.3

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

The Port of Seattle's other operations statewide fiscal impacts include generating roughly \$32 million in total tax revenues, primarily representing B&O and sales and use taxes (**Exhibit 85**).

**Exhibit 85. Port of Seattle Tenants and Other Business Total Fiscal Impacts,
Washington, 2023**

	Direct	Secondary	Total
B&O	\$4.7	\$9.2	\$13.9
Sales & Use Taxes	\$0.1	\$15.7	\$15.8
Other	\$0.0	\$2.1	\$2.1
Total	\$4.8	\$27.0	\$31.8

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Exhibit 86 presents economic and fiscal impacts throughout the region supported by other Port of Seattle tenants and businesses. Total economic

impacts include direct, indirect, and induced impacts represented by jobs, business output, and total compensation. Total fiscal impacts include state and local taxes, which primarily represent state sales and B&O taxes supported by economic activity within each city and local taxes represent the local sales and B&O taxes supported by total economic activity within each city

Exhibit 86. Port of Seattle Tenants and Other Business Total Economic and Fiscal Impacts, Top Ten Cities by Jobs Impact, 2023

City	Economic Impacts			Fiscal Impacts		
	Jobs	Business Output (mils 2023\$)	Total Compensation (mils 2023\$)	State Taxes (mils 2023\$)	Local Taxes (mils 2023\$)	Total (mils 2023\$)
Seattle	8,270	\$1,681.1	\$764.6	\$10.40	\$6.86	\$17.26
Tacoma	440	\$80.5	\$28.5	\$1.41	\$0.67	\$2.08
Kent	360	\$77.1	\$25.0	\$1.34	\$0.60	\$1.94
Federal Way	300	\$53.1	\$18.6	\$0.93	\$0.33	\$1.26
Renton	280	\$58.5	\$19.0	\$1.02	\$0.44	\$1.46
Puyallup	260	\$47.4	\$16.6	\$0.83	\$0.30	\$1.13
Auburn	230	\$46.0	\$15.2	\$0.80	\$0.35	\$1.15
Bellevue	210	\$39.3	\$15.0	\$0.69	\$0.31	\$1.00
Bonney Lake	130	\$22.9	\$8.0	\$0.40	\$0.12	\$0.52
Redmond	110	\$22.3	\$8.6	\$0.39	\$0.14	\$0.53

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

Note: Economic impacts represent total economic impacts including direct, indirect, and induced impacts by city, as well as the state and local taxes generated by direct, indirect, and induced impacts by city.

Economic and Fiscal Impacts

In 2023, the Port of Seattle’s total operations supported an estimated 205,000 jobs throughout Washington. Nearly \$12.6 million in total compensation was distributed to the supported jobs, and the Port of Seattle’s operations supported nearly \$39 billion in business output throughout the state (**Exhibit 87**).

Exhibit 87. Port of Seattle Total Economic Impacts by Activity, Washington, 2023

	Direct	Indirect	Induced	Total
SEA Airport				
Jobs	94,510	25,140	55,300	174,950
Total Compensation (mils 2023 \$)	\$5,400.3	\$1,700.1	\$3,401.3	\$10,501.7
Business Output (mils 2023 \$)	\$17,380.5	\$5,709.6	\$10,281.1	\$33,371.3
Cruise				
Jobs	2,230	950	1,610	4,790
Total Compensation (mils 2023 \$)	\$134.5	\$71.6	\$98.7	\$304.9
Business Output (mils 2023 \$)	\$613.9	\$230.4	\$298.5	\$1,142.7
Commercial Fishing				
Jobs	5,770	470	2,550	8,790
Total Compensation (mils 2023 \$)	\$293.0	\$34.5	\$156.9	\$484.4
Business Output (mils 2023 \$)	\$418.2	\$145.9	\$474.2	\$1,038.3
Recreational Marinas				
Jobs	515	110	390	1,015
Total Compensation (mils 2023 \$)	\$42.3	\$7.4	\$23.8	\$73.5
Business Output (mils 2023 \$)	\$58.5	\$23.3	\$71.9	\$153.8
Tenants and Other Businesses				
Jobs	6,550	2,110	6,360	15,020
Total Compensation (mils 2023 \$)	\$662.7	\$154.4	\$391.4	\$1,208.5
Business Output (mils 2023 \$)	\$1,458.5	\$502.6	\$1,183.1	\$3,144.3
Total				
Jobs	109,575	28,780	66,210	204,565
Total Compensation (mils 2023 \$)	\$6,532.9	\$1,968.0	\$4,072.1	\$12,573.0
Business Output (mils 2023 \$)	\$19,929.6	\$6,611.9	\$12,308.8	\$38,850.3

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

In total, the state of Washington collected nearly \$400 million in state taxes as a result of the Port of Seattle's operations (**Exhibit 88**). That includes over \$340 million in fiscal impact generated by SEA Airport.

Exhibit 88. Port of Seattle Total Fiscal Impacts by Activity, Washington, 2023

	Direct	Secondary	Total
SEA Airport	\$79.1	\$262.3	\$341.5
Cruise	\$2.3	\$8.1	\$10.3
Commercial Fishing	\$0.9	\$9.8	\$10.7
Recreational Marinas	\$0.2	\$1.6	\$1.9
Tenants and Other Businesses	\$4.8	\$27.0	\$31.8
Total	\$87.3	\$308.9	\$396.2

Sources: Washington State Office of Financial Management; 2025; Community Attributes Inc., 2025.

ECONOMIC AND FISCAL IMPACTS

The Northwest Seaport Alliance, Port of Tacoma, and Port of Seattle supported nearly 265,000 jobs in the economy in 2023. Together, the organizations supported \$17.6 billion in total compensation and generated nearly \$55 billion in business output (**Exhibit 89**).

Exhibit 89. Total Economic Impacts of the NWSA, Port of Tacoma, and Port of Seattle, Washington, 2023

	Jobs	Total Compensation (mils 2023 \$)	Business Output (mils 2023 \$)
The Northwest Seaport Alliance	52,105	\$4,350.4	\$13,991.6
Containerized Cargo	46,290	\$3,829.2	\$12,539.1
Autos	3,735	\$347.4	\$908.3
Bulk, Breakbulk, and Other	2,080	\$173.8	\$544.2
Port of Tacoma	8,140	\$675.0	\$1,975.9
Tenants and Bulk Operations	4,800	\$391.1	\$1,177.3
Autos	3,340	\$283.9	\$798.6
Port of Seattle	204,565	\$12,573.0	\$38,850.3
SEA Airport	174,950	\$10,501.7	\$33,371.3
Cruise	4,790	\$304.9	\$1,142.7
Commercial Fishing	8,790	\$484.4	\$1,038.3
Recreational Marinas	1,015	\$73.5	\$153.8
Tenants and Other Businesses	15,020	\$1,208.5	\$3,144.3

Sources: Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

Together, the NWSA, Port of Tacoma, and Port of Seattle helped generate nearly \$550 million in state tax revenues in 2023 (**Exhibit 90**).

**Exhibit 90. Total Fiscal Impacts of the NWSA, Port of Tacoma, and Port of
Seattle, Washington, 2023**

	Direct	Total
The Northwest Seaport Alliance	\$23.5	\$134.1
Containerized Cargo	\$21.0	\$119.6
Autos	\$1.7	\$9.9
Bulk, Breakbulk, and Other	\$0.8	\$4.6
Port of Tacoma	\$3.5	\$19.8
Tenants and Bulk Operations	\$1.6	\$8.5
Autos	\$1.9	\$11.3
Port of Seattle	\$87.3	\$396.2
SEA Airport	\$79.1	\$341.5
Cruise	\$2.3	\$10.3
Commercial Fishing	\$0.9	\$10.7
Recreational Marinas	\$0.2	\$1.9
Tenants and Other Businesses	\$4.8	\$31.8

Sources: Washington State Office of Financial Management, 2025; Community Attributes Inc., 2025.

**INTERLOCAL AGREEMENT
BETWEEN THE PORT OF TACOMA, PORT OF SEATTLE, AND THE NORTHWEST
SEAPORT ALLIANCE REGARDING AN ECONOMIC IMPACT ANALYSIS**

This Interlocal Agreement ("Agreement") is entered into this 2nd day of April 2024, by and between the Port of Tacoma and Port of Seattle, both public port districts organized under the laws of the State of Washington, and The Northwest Seaport Alliance, a Washington Port Public Development Authority pursuant to RCW 53.57, referred to herein individually as "Party" and together as "Parties", as authorized by RCW 39.34 (the Interlocal Cooperation Act) and the Port Joint Powers authority RCW 53.08.240.

RECITALS

WHEREAS, the Parties desire to jointly develop an Economic Impact Analysis; and

WHEREAS, a jointly developed analysis will demonstrate comprehensive economic impacts and value across all lines of business with a special focus on measuring the impact we envision towards building a more equitable and inclusive communities; and

WHEREAS, the analysis will include local, regional, and state impacts on indirect, induced, and direct jobs; total compensation; business output; labor income; fiscal direct and secondary impacts; taxes; our equity impact, and special considerations for specific lines of business; and

WHEREAS, the Northwest Seaport Alliance, Port of Tacoma, and Port of Seattle are all committed to advancing equity, diversity, and inclusion within their organizations and communities so that they mirror - throughout the breadth of their operations and within their leadership structure - the diversity of the communities they serve, instill principles of equity into their culture, and ensure a fair and intentional distribution of opportunities with the goal of expanding economic development and quality of life for all.

WHEREAS, results of this analysis will inform volume trends for official statements in federal financial bonds; and

WHEREAS, results of this analysis will inform communications and marketing materials, and will support storytelling about the Parties' value to the community; and

WHEREAS, this analysis will be data driven and will be performed recognizing our shared commitment to diversity, equity, and inclusion; allow us to speak to our impact on equity, and

WHEREAS, results of this analysis will support grant applications and the advancement of legislation.

AGREEMENT

NOW, THEREFORE, in consideration of the mutual promises, benefits, and obligations hereinafter set forth, the Parties agree as follows:

1. **Timing.** The Parties will work together to scope and complete an Economic Impact Analysis in 2024.

2. **Future analyses.** Moving forward, the Parties will strive for joint Economic Impact Analysis updates every three years, understanding that some lines of business will need more frequent interim updates.
3. **Personal Services Contract.** Contracting for consultant support of Economic Impact Analysis will be managed by the Port of Tacoma.
4. **Financial contribution.** The Parties will each contribute staff time and will contribute their proportionate cost of consultant support as follows: Port of Tacoma: 20%; NWSA: 20%; and the Port of Seattle: 60% based on the anticipated additional data provided and analysis requested by the Port of Seattle. The total cost of the consultant may not to exceed \$300,000.
5. **Term of the Agreement.** The Agreement covers the time necessary to complete the Economic Impact Analysis beginning by June 31, 2024, with anticipated completion by June 31, 2025. A Personal Services Contract will be entered into by the Port of Tacoma for one year, with up to four possible one-year time extensions if agreed upon by the Parties, but may be earlier terminated by mutual agreement of the Parties.
6. **Miscellaneous.**
 - A. **Third Party Beneficiaries.** This Agreement does not create any rights, claims, or benefits inuring to any person that is not a party hereto, and it does not create or establish any third-party beneficiary hereto.
 - B. **Binding Effect.** This Agreement shall be binding upon and inure to the benefit of the Parties, and their legal representatives, successors, and permitted assigns.
 - C. **Severability.** If any provision of this Agreement shall be held to be invalid, illegal, or unenforceable, the validity, legality, and enforceability of the remaining provisions shall not in any way be affected by or impaired thereby. The Parties agree to use good faith efforts to replace such invalid or unenforceable provision of this Agreement with a valid and enforceable provision that will achieve, to the extent possible, the purposes of such invalid or unenforceable provision. If the Parties cannot reach a mutually agreeable and enforceable replacement of such invalid, illegal, or unenforceable provision, the balance of the Agreement shall be interpreted as if such provision were so excluded so as to reasonable effectuate the intent of the Parties.
 - D. **Notices.** Unless otherwise specified herein, all notices, consents, approvals, reports, designations, requests, waivers, elections, and other communication authorized or required to be given pursuant to this Agreement shall be in writing and shall be given or made (and shall be deemed to have been duly given or made upon receipt) by personal hand0delivery, b facsimile transmission, by electronic mail, by mailing the same in a sealed envelope, certified first-class mail, postage prepaid, return receipt requested, or by air courier guaranteeing overnight delivery, sent to the addresses on Schedule 3 of the NWSA Charters (as such may be updated by notice from time to time).

E. Usage Generally; Interpretation.

1. The captions and headings of this Agreement are for convenience of reference only and shall not affect the interpretation of this Agreement.
2. Any statute or law defined or referred to herein means such statute or law as from time to time is amended, modified, or supplemented, including by succession of comparable successor statutes.

F. Entire Agreement. This Agreement embodies the entire agreement of the Parties and supersedes all prior agreements and understandings between the Parties with respect to the subject matter herein.

G. Counterparts. This Agreement may be executed in any number of counterparts, including by electronic transmission or facsimile, each of which shall be deemed an original, but all of which shall constitute one and the same instrument.

H. Amendments. The terms and provisions of this Agreement may only be modified or amended at any time and from time to time by mutual agreement of the Parties.

I. Further Assurances. Each Party shall execute and deliver any additional documents and instruments and perform any additional acts that the Parties determine to be necessary or appropriate to effectuate and perform the provisions of this Agreement.

J. Governing Law. This Agreement shall be governed and construed in accordance with the laws of the State of Washington, without regard to the conflicts of law principles thereof. Generally, in the event of a conflict, the following sources of authority shall prevail in descending order of supremacy: (i) Washington state law and regulation, including the Port Joint Powers statute (RCW 53.08.240), the Port Development Authority, Chapter 53.57 RCW; and this Agreement; (ii) any policies of the NWSA; and (iii) any policies of the Port.

K. Costs, Fees and Expenses. Each Party shall bear any legal and other costs, fees and expenses incurred by such Party in connection with the negotiation and preparation of this Agreement and the transactions contemplated hereby.

L. Waivers. No waiver of any breach of any of the terms of this Agreement shall be effective unless such waiver is made expressly in writing and executed and delivered by the Party against whom such waiver is claimed. No waiver of any breach shall be deemed to be a further or continuing waiver of such breach or a waiver of any other or subsequent breach. Except as otherwise expressly provided herein, no failure on the part of any Party to exercise, and no delay in exercising, any right, power, or remedy hereunder, or otherwise available in respect hereof at law or in equity, shall operate as a waiver thereof, nor shall any single or partial exercise of such right, power, or remedy by such Party preclude any other or further exercise thereof, or the exercise of any other right, power, or remedy.

M. Ratification. Acts taken in conformity with this Agreement prior to its execution are

hereby ratified and affirmed.

- N. Execution and Filing of Agreement.** Upon execution by all Parties, each such signed original shall constitute a binding Agreement upon both Parties. In accordance with RCW 39.34.040, a copy of this Agreement shall be recorded in the Office of the Pierce and King County Auditors or posted by all Parties on their respective websites. This Agreement will not take effect until it has been successfully recorded or posted in either location.
- O. Independent Municipal Governments.** The Parties hereto are independent governmental entities, and nothing herein shall be construed to limit the independent government powers, authority, or discretion of the governing bodies of each Party.
- P. Legal Obligations.** This Agreement does not relieve either Party of any obligation or responsibility imposed upon it by law.
- Q. Timely Performance.** The requirements of this Agreement shall be carried out in a timely manner according to a schedule negotiated by and satisfactory to the Parties.
- R. Records and Audit.** During the term of this Agreement, and for a period not less than six (6) years from the date of termination, records and accounts pertaining to the work of this Agreement and accounting therefore shall be kept by each Party and shall be available for inspection and audit by representatives of either Party and any other entity with legal entitlement to review said records. If any litigation, claim, or audit is commenced, the records and accounts along with supporting documentation shall be retained until all litigation, claims, or audit finding has been resolved, even though such litigation, claim, or audit continues past the six-year (6) retention period. This provision is in addition to and is not intended to supplant, alter, or amend records retention requirements established by applicable state and federal laws.
- S. Limits of Financial Obligations/Property Ownership.** Except as provided above, each Party shall finance its own conduct of responsibilities under this Agreement. No ownership of property will transfer as a result of this Agreement.
- T. Effective Date & Termination.** This Agreement shall be effective upon signature by all Parties and a copy being recorded with the respective County Auditors or posted on all Parties' web sites as authorized by RCW.39.34.040 ("Effective Date") until or unless terminated in accordance with Section 5 of this Agreement.
- U. Indemnification and Hold Harmless**

 - 1. The NWSA releases the Port from, and shall defend, indemnify, and hold the Port and its agents, employees, and/or officers harmless from and against all claims, demands, suits at law or equity, actions, penalties, losses, damages, or costs, of whatsoever kind or nature, made by or on behalf of the NWSA and/or its agents, employees, officers, contractors and/or subcontractors, arising out of or in any way related to the NWSA's

performance of its obligations under this Agreement, unless and except to the extent the same be caused in whole or in part by the negligence or willful conduct of the Port or its agents, employees, and/or officers.

2. The NWSA shall defend, indemnify, and hold the Port and its agents, employees, and/or officers harmless from and against all claims, demands, suits at law or equity, actions, penalties, losses, damages, or costs, of whatsoever kind or nature, made by or on behalf of any third parties and/or their agents, employees, officers, contractors and/or subcontractors, arising out of or in any way related to the NWSA's performance of its obligations under this Agreement, unless and except to the extent the same be caused in whole or in part by the negligence or willful conduct of the Port or its agents, employees, and/or officers.
3. Each Party specifically assumes liability for actions brought by its own employees against the other Party and for that purpose each Party specifically waives, as respects the other Parties only, any immunity under the Worker's Compensation Act, RCW Title 51.
4. The Parties recognize that this waiver was the subject of mutual negotiation. In the event any Party incurs attorney's fees, costs, or other legal expenses to enforce the provisions of this Agreement against the other Party, all such fees, costs and expenses shall be recoverable by the substantially prevailing Party.
5. No liability shall attach to any of the Parties by reason of entering into this Agreement except as expressly provided herein.
6. The provisions of this Section V.(1)-(6) shall survive any termination or expiration of this Agreement.

< SIGNATURES ON NEXT PAGE >

PORT OF TACOMA

By: 

Eric D. Johnson, Executive Director

Date:

Approved as to form:

By: 

Heather Burgess, General Counsel

Date:

THE NORTHWEST SEAPORT ALLIANCE

By: 

John Wolfe, Chief Executive Officer

Date:

Approved as to form:

By: 

Dana Henderson, General Counsel

Date:


PORT OF SEATTLE

By: 

Karen Goon, Deputy Executive Director (acting Executive Director)

Date:

Approved as to form:

By: 

Ryan Stamper, Sr. Counsel

Date:

Item No.: 10B
Meeting: July 1, 2025

2025 Economic Impact Analysis

Presenters:

Deirdre Wilson, AICP, Director, Planning & Permitting
Joseph Gellings, AICP, Senior Planner, Maritime Planning

1

Economic Impact Analysis

Port of Seattle, Port of Tacoma, Northwest Seaport Alliance

Approach: Collaborative with Port of Tacoma, Port of Seattle, and Northwest Seaport Alliance with a plan to update on a 3-year cadence moving forward.

Purpose: The statistics emerging from the study will be put to innumerable uses. Just to name a few: demonstrating our impacts across the community, in making our case for grants and construction bonds, and in storytelling about issues such as industrial land and cargo diversion.

Process: Contracted through competitive process with Community Attributes, Inc. Collaborative effort with about 50 individuals from the Port of Seattle, Port of Tacoma, NWSA.



2

2

Economic Impact Analysis

Port of Seattle, Port of Tacoma, Northwest Seaport Alliance

- Last update done in 2019, using 2017 data.
- Data available for the analysis is 2023.
- Contracting is managed by PoT via Interlocal Agreement (ILA) approved in 2024.
- Contract amount not to exceed \$300k.



3

3

Economic Impact Analysis

Port of Seattle, Port of Tacoma, Northwest Seaport Alliance

The Northwest Seaport Alliance. Representing container cargo, autos, breakbulk, and bulk cargo shipments across the ports of Seattle and Tacoma.

Port of Tacoma. Including autos, grain and gypsum, warehousing, light manufacturing, trucking, and other tenants at the Port of Tacoma.

Port of Seattle. Including SEA Airport, cruise ships, commercial fishing, recreational marinas, grain, other tenants at the Port of Seattle, and economic development, community.



4

4

Port of Seattle - Port of Tacoma - Northwest Seaport Alliance Combined Economic Impact, 2023 data				
Port Authority Line of Business	Total Business Output	Total Jobs Supported	Total Employee Compensation	Total State Fiscal Impact
SEA Airport	\$334 Billion	174,950	\$10.5 Billion	\$342 Million
Port of Seattle Cruise Ship Industry	\$1.2 Billion	5,060	\$357 Million	\$11 Million
Port of Seattle Commercial Fishing	\$1.0 Billion	8,790	\$484 Million	\$11 Million
Port of Seattle (other)	\$3.3 Billion	16,035	\$1.3 Billion	\$34 Million
Port of Tacoma (other)	\$2 Billion	8,140	\$675 Million	\$20 Million
Northwest Seaport Alliance	\$14 Billion	52,105	\$4.4 Billion	\$134 Million
Total	\$355.5 B	265,080	\$17.7 B	\$552 M



5

5

Economic Impact Analysis

Port of Seattle, Port of Tacoma, Northwest Seaport Alliance

Together, the Port of Tacoma, Port of Seattle and the Northwest Seaport Alliance:

- Supported more than 265,000 jobs.
- Supported \$17.7 billion in total compensation.
- Generated nearly \$355 billion in business output.
- Generate \$552 million in state tax revenues.



6

6

Economic Impact Analysis

Port of Seattle, Port of Tacoma, Northwest Seaport Alliance

NEXT STEPS:

- | | |
|-----------|---|
| July 2025 | Joint Press Release |
| Aug 2025 | External communication updates |
| Jun 2027 | Budget, plan, contract, scope for the next Joint Economic Impact Analysis |

