



National Retail Federation®
The Voice of Retail Worldwide

Port of Long Beach
Pulse of the Ports
March 27, 2013

Who is NRF

- World's Largest Retail Trade Association
- Operate more than 3.5 million U.S. establishments
- Support one in four U.S. jobs - 42 million Americans
- Contribute \$2.5 trillion to annual GDP
- Encourages policymakers to support a [Jobs, Innovation and Consumer Value Agenda](#) aimed at boosting economic growth and job creation.
- NRF's [Retail Means Jobs](#) campaign emphasizes the economic importance of retail
- NRF is launching "This is Retail," which will focus is on Careers, Communities and Innovation.

Economy

- 2012 Growth
 - Continued steady economic growth
 - Holiday Sales
 - Projected 4.1%
 - Actual 3.0%, \$579.8 billion
 - Import growth
 - 2012 growth - 15.8 million TEU, up 2.9 %
 - 2013 estimate 3.2%
 - East Coast 2.6%
 - West Coast 3.6%
 - LA/Long Beach 3.4%

Economy

- 2013 Economic Forecast
 - 3.4% forecast; slightly lower than 2012 (4.2%)
 - Online sales to grow between 9-12%
- February 2013
 - Sales up 0.7% from January 2013
 - Sales up 0.5% from February 2012

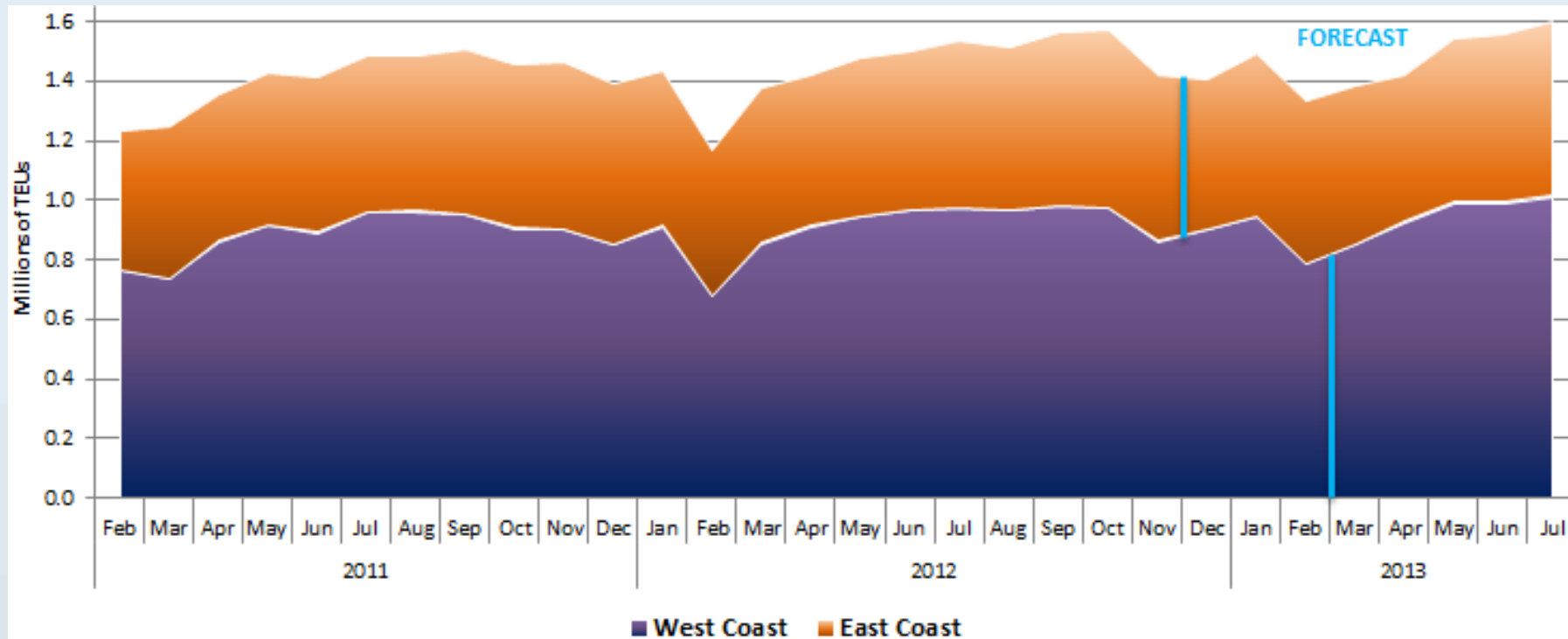
Economy

- Retail Imports
 - February estimate up 6.8%
 - March estimate up 2.3%
 - First Half 2013 expected 4.3% growth

NRF Global Port Tracker

March 2013

Imports by Coast, Monthly Level



Economy

- Challenges
 - “Fiscal Cliff” / Debt Limit / Sequestration
 - Consumer confidence
 - Unemployment
 - Legislative/Regulatory Uncertainty

Supply Chain Issues

- Port Labor Negotiations
- Sequestration
- Operational
 - Clean Trucks
 - Turn Times
 - Chassis Management
 - Infrastructure

Supply Chain Issues

- Driver's Hours of Service
- WRDA – HMT Reform
- Highway Bill Reauthorization
- Customs Reauthorization
- Free Trade Negotiations

Questions ?

Contact Information

Jonathan Gold

Vice President, Supply Chain &
Customs Policy

Email: goldj@nrf.com

Phone: (202) 626-8193

Twitter: @JonGoldDC