

Port of LA gains market share as US ports lag

In issue 740 of the *Sea-Intelligence Sunday Spotlight*, we analysed the laden import volume throughput of the major North America West Coast (NAWC) ports, through the first three quarters of 2025. Our analysis revealed a significant divergence in handled volumes: while Canadian ports performed in line with their pre-pandemic benchmarks, all major US West Coast ports underperformed. Amid this regional underperformance, the Port of Los Angeles successfully consolidated its position, capturing a larger share of the total NAWC market.

The Canadian ports of Vancouver and Prince Rupert saw 2025-Q3 growth that was broadly consistent with their 2017-2019 pre-pandemic averages. In contrast, all major California ports and the Northwest Seaport Alliance (NWSA, A partnership between the ports of Seattle and Tacoma) underperformed their historical benchmarks, with NWSA seeing the largest negative deviation. This divergence directly drove the market share shifts seen in Figure 1.

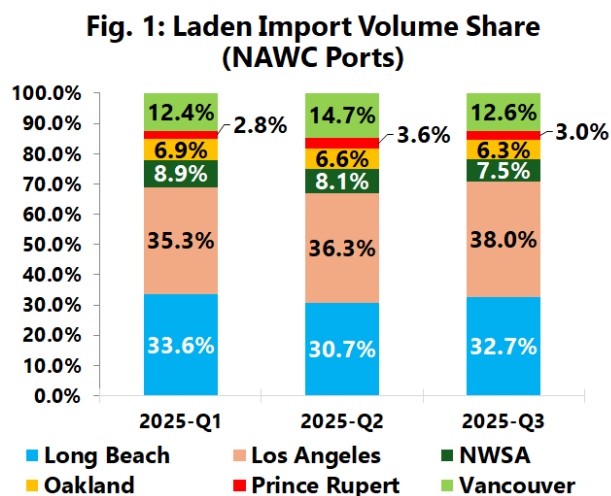


Figure 1 shows how this divergent performance impacted each port's share of the total NAWC laden import volumes through the first three quarters of 2025. The data reveals a significant consolidation of market share within the San Pedro Bay port complex, which in aggregate grew from 68.9% of NAWC laden imports in 2025-Q1 to 70.7% in 2025-Q3.

This aggregate gain was driven entirely by the Port of Los Angeles, which expanded its individual market share from 35.3% in 2025-Q1 to 38.0% in 2025-Q3. This gain was partially offset by its neighbour, the Port of Long Beach, which saw its share decline from 33.6% in 2025-Q1 to 32.7% in 2025-Q3. The most consistent market share loss was seen at NWSA, which declined Q/Q from 8.9% in 2025-Q1 to 7.5% in 2025-Q3. Oakland also saw a steady, smaller decline from 6.9% in 2025-Q1 to 6.3% in 2025-Q3.

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