



Market Opportunities

Great Lakes St Lawrence Seaway System

Port of Green Bay Symposium

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Peter Hirthe

Great Lakes Regional Representative
GLS Office of Trade & Economic Development



The Great Lakes St. Lawrence Seaway





Great Lakes St. Lawrence Seaway Development Corporation

- A wholly owned Government Corporation and an operating Administration of the U.S. Department of Transportation

- Responsible for the operations and maintenance of the U.S. portion of the St. Lawrence Seaway between Montreal and Lake Erie

- Maintain and Operate Two U.S. Seaway Locks
- Vessel Traffic Control
- Trade Development

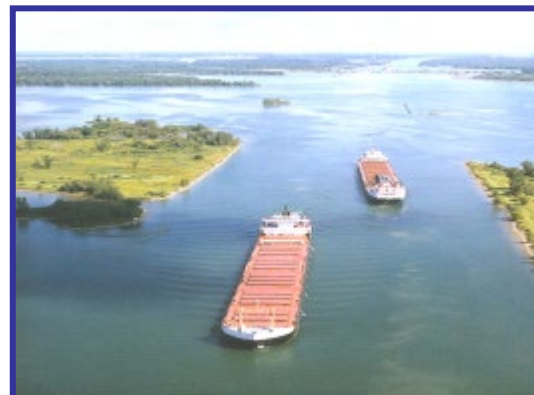
- **Bi-National Operations in Coordination with The Canadian St. Lawrence Seaway Management Corporation (SLSMC)**



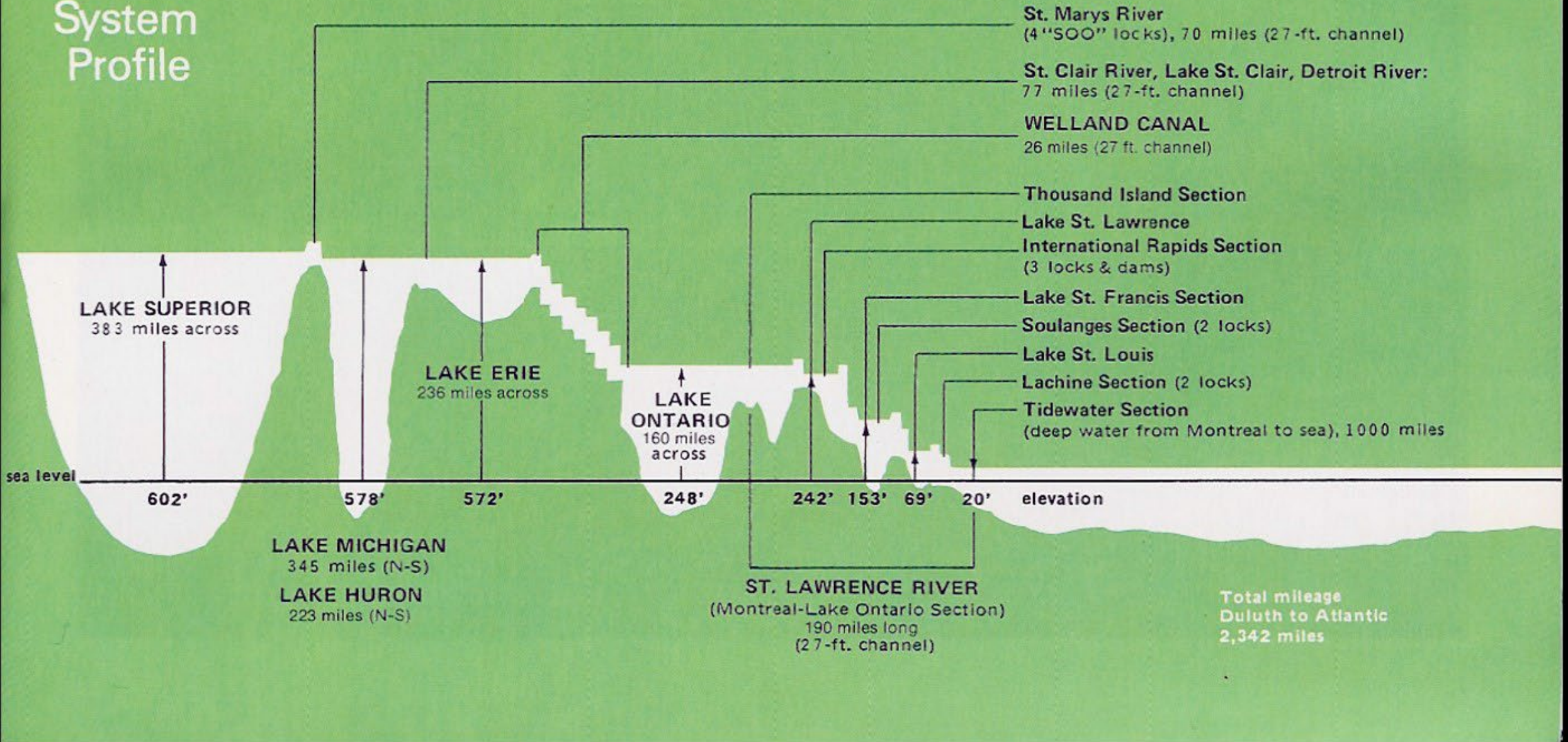


The Seaway

- Great Lakes Seaway System is 2,342 miles long and borders two countries, eight U.S. states and two Canadian provinces.
- Operational approximately 285 days of the year, over 99.5% system Reliability
- Cargo carried by U.S. Lakers, Canadian Lakers, International Carriers (“salties”), and barges throughout the Seaway System.
- On its own, the Great Lakes Regional economy would rank 3rd globally behind only the US and China.
- Vessels cross the international border 27 times when transiting the system end to end.



System Profile



60 STORY WATER "STAIRCASE"



Each Ship Into the System Increases The Export Capacity of the System

A Seaway Ship is a 8,000-22,000 MT container Exports Provide Lane Balance





System Resiliency

2020: 37.736 million tons (-1.66%)

Sectors Impacted: Manufacturing (Auto), Steel, & Construction

Sectors of Strength: Grain & Project Cargo

(Grain up 27%, Wind Energy cargo record set in Duluth, 10 U.S Ports Handled)

2021: 38.193 million tons (+1.14%)

Sectors Impacted: Grain, Project Cargo

Sectors of Strength: Steel, Iron Ore,

Construction, & Manufacturing

(Iron Ore up 13%, General Cargo up 73.19%, Dry Bulk up 7.7%)

***Two Very Different Formulas With Very Similar Year End Results**

***Trade With Over 50 Countries**

***System Over 99.5 % Reliable Each of these Navigation Seasons**



2022 Seaway Navigation Season Opening





2022 Navigation Season

Early Observations:

1. Ocean vessels are arriving ahead of 2021 pace
2. Cleveland-Europe Express Liner service container vessel arrived & departed fully loaded
3. Corn exports moving out in strong volume
4. Iron Ore is moving out from the Iron Range
5. Steel is arriving to support manufacturing
6. Energy project cargoes are due later this month
7. Oswego's new Ag Export facility loaded its first vessel



LAKE ST. CLAIR



Seaway Opportunity

“Maritime Supply Chains Are Under Stress” (Containers & Agriculture)

The “Window is Open” to Integrate the Great Lakes St Lawrence Seaway System into supply chains in need of relief and/or diversification.

- Midwest Container Shippers Looking for Maritime Alternatives
- Global Agricultural Buyers Are Seeking Alternative Sourcing
- Seaway System Has Vessel Capacity
- Seaway System is Dependable (Over 99.5%)
- Vessel Accessibility Has Increased: HFM’s first full season in 2020
- Simple, Direct By Water Into 3rd Largest Economy in World
- Seaway System is an agricultural export system (“Steel In-Grain Out”)
- Adds Sustainability & Balance to North America’s overall supply chain

Great Lakes Ports & Terminals are investing in their infrastructure and addressing some of the new supply chain realities shippers are facing.

- And Funding is Available to Assist. (MARAD PIDP-HAP-OMAP...)

Hands Free Mooring (HFM)





Seizing the Opportunity

- 1. To Develop A Great Lakes Container Network (Expand CBP Clearance Capability)**
 - A. Cleveland Expanded Service in 2021 (Successfully Selling a Direct & Reliable Maritime Route)
 - B. Duluth attained U.S. Customs & Border Protection Container Clearance in 2021
 - *Additional Great Lakes Markets are needed to Increase Seaway Customer Base & Expand Service
- 2. To Increase U.S Agricultural Exports**
 - A. Each season has unique market conditions. (High Corn Demand in 2022 YTD)
 - B. New Investments Are Being Made in the System to increase capability
(Oswego Facility Open, Milwaukee Facility in 2023, Duluth CBP Container Clearance in 2021)
 - C. Containerization will expand shipping options for Midwest growers (Not all ship in bulk)
 - D. Identify & Promote the Seaway System to Emerging Overseas Markets for US Agricultural Exports.
- 3. To Develop New Trade Lanes (Find Lane Balance)**
 - A. Identify & Engage New Ocean Carriers & Cargos “Testing the Waters of the Great Lakes”
 - B. Work to Expand Liner Services beyond Europe, North Africa, & Middle East (South America & Asia)
 - *Provide Midwest shippers more global maritime supply chain options
- 4. To Continue Port Infrastructure Investments that Add Value To The Maritime Supply Chain (Container Capability –Storage & Warehousing Capacity-Multimodal Connectivity....)**



Spliethoff

*Cleveland-Europe Express
Service*

Antwerp-Cleveland Route

Established 2014

Spliethoff Owned Containers

2021:

*Added a Dedicated 897 TEU
Container Vessel*



GLS Initiatives

Strategic Plan Approved By Congress in 2021

“Increase Great Lakes System Awareness” is One of the Key Focus’

Initiatives:

- Overseas Trade Missions (Import and Export Dialogue)
- Cargo Trade Show Visibility (Domestic & **International**)
 - Increase Great Lakes Seaway awareness & understanding
 - Catalyze growth of maritime trade
- Trade Association Membership Direct engagement on what the Great Lakes Maritime Supply Chain can offer to shippers:
(SSGA-U.S. Grains Council-NGFA-NCBFAA-Cleanpower-USSEC)
- Local Outreach Support and strengthen relationships between Great Lakes Ports, importers, exporters/growers within their respective Regions to identify synergies.

Maintain Dialogue with Stakeholders, Carriers & Trade Partners Overseas

- **Amplify the Great Lakes St Lawrence Seaway System Globally**
- **Monitor the ever changing & evolving global supply chain for opportunities.**



THANK YOU!

Peter Hirthe

International Trade Specialist

Great Lakes Saint Lawrence Seaway

Development Corporation

Washington, DC

414-551-3161

Peter.hirthe@dot.gov