

2014 Navigation Season Ends

A new regular liner service, significant grain exports, increased ocean vessel transits, and harsh winter weather conditions at the start of the season were the headlines during a busy and successful 2014 navigation season on the St. Lawrence Seaway. The U.S. sector of the binational waterway's 2014 season ended December 31, 2014, after the *M/V Sten Bergen* moved downbound through Snell Lock at 2:42 p.m., with a load of vacuum gas oil and fuel oil headed to Amsterdam, The Netherlands. The binational Seaway closed out a 280-day season at 00:22 a.m. the next morning, January 1, 2015, as the vessel cleared St. Lambert Lock in Montreal.

Final results show a tally of almost 40 million tons handled, a seven percent increase in tonnage over 2013 totals and the first time since 2008 that freight numbers have topped that key threshold. With vessel transit data practically unchanged (3,909 vs. 3,900) a sharp spike in ocean-going vessels trading in the System this year—872 vs. 714—offered hard evidence of increased international interest in the Seaway System.

Steel in, grain out—the phrase that frequently captures the binational waterway's commodity picture at the macro level—proved to be spot on in describing 2014's tonnage focus. U.S. grain tonnage



The last vessel to clear the System was the 473 foot ocean vessel *M/V Sten Bergen*. She was bound for Amsterdam and cleared Snell Lock at 1440 hours, December 31, 2014.

soared 37 percent to 2.3 million mt compared to 2013 shipping season stats and the Twin Ports handled almost half of that amount with close to a million tons headed to overseas markets. A huge backlog of Canadian grain after a harsh winter (2013–14)

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ADMINISTRATOR'S COLUMN

SLSDC Launches New Regional Outreach Initiative



Betty Sutton
Administrator

One of the important objectives of the Saint Lawrence Seaway Development Corporation (SLSDC) is to promote trade and economic development throughout the Great Lakes St. Lawrence Seaway

region. For 30 years, the SLSDC has engaged in trade development activities to promote the waterway and its

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GUEST COLUMNIST

Brenda Sandberg Executive Director, Erie-Western Pennsylvania Port Authority



Brenda Sandberg

Similar yet Different

As the winter has fallen upon the Great Lakes, it provides those of us in the trenches additional time to not only get caught up on a backlog of work but also to reflect on the past year. I am new to the trench; the past three months have been a whirlwind of activity and knowledge gathering.

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stakeholders in order to drive economic growth. Frankly, the Seaway exists for economic activity in the region, connecting North America's 'Opportunity Belt' to the world. To that end, I am pleased to announce that, as of February 1st, the SLSDC has established a new Great Lakes regional outreach initiative which will focus on trade and economic development activities 'on-the-ground' working with the Great Lakes St. Lawrence Seaway System stakeholder community.

Adam Schlicht, a member of the SLSDC staff for the past five years, will lead the new initiative, coordinating closely with Seaway governmental, nongovernmental, and industry stakeholders across the 'Opportunity Belt'. As an Economic Development Specialist, he will work with and support Great Lakes/Seaway ports, terminals, shippers, carriers, and labor to

increase maritime trade; meet with federal, state and local elected officials to offer assistance; coordinate with other regional Federal entities, Great Lakes state DOT's, and regional economic development agencies to ensure Seaway System maritime transportation is understood and prioritized in regional planning; and promote federal maritime transportation and funding assistance programs. In this role, he will also be responsible for leading future SLSDC regional activities and programs that directly assist Great Lakes ports, businesses, the public and other stakeholders.

The SLSDC Regional initiative will greatly complement the SLSDC's existing economic development and policy work in Washington, D.C. as well as our lock operations and marine services in Massena, NY. It will also enhance our joint trade development and marketing efforts with the Canadian Saint Lawrence Seaway Management Corporation

through the binational Highway H₂O program, promoting broader participation across all Highway H₂O programs and initiatives. You can reach Adam on his professional cell phone at 216-379-9106 or by email at adam.schlicht@dot.gov.

Our binational waterway provides the access to the cities, states, and provinces in the region, where trade opportunities abound. SLSDC's new regional outreach initiative will support and encourage greater economic opportunities for the people and businesses throughout the 'Opportunity Belt' that depend on the Great Lakes. I am confident this approach to trade and economic development will advance the SLSDC's efforts to effectively support the Great Lakes region, increase commercial trade through the waterway, and provide increased tangible benefits for the economies of both the United States and Canada. ■■■

New Marketing Materials Developed

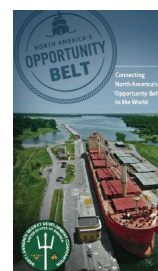
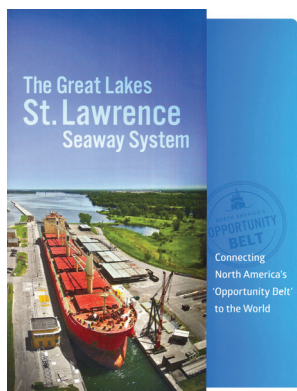
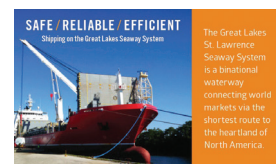
The Saint Lawrence Seaway Development Corporation (SLSDC) is pleased to announce that it has recently launched a number of new promotional materials, including an updated marketing brochure and two different "palm cards", highlighting the importance of shipping across the Great Lakes St. Lawrence Seaway System. These tools aim to further expand the reach and role of the SLSDC across the 'Opportunity Belt' of the System by stressing the Great Lakes region as uniquely ready for domestic and international shipping interests now and in the future. The 'Opportunity Belt' moniker further compliments and emphasizes the binational vision of the Seaway System as a marine 'Highway

H₂O' facilitating and bringing new growth in manufacturing, construction, agriculture, steel, and many other industries.

The brochure is a printed, 10-page pamphlet which details and promotes the value of shipping on the Great Lakes. It has been printed on high-quality paper, uses sophisticated images and graphics, and incorporates contemporary trade information about the System. The economic, environmental, and commercial importance of shipping is stressed, and updated nautical and other sailing data to major international ports is offered.

Two distinct palm cards have also been developed. The palm cards, each a card the size of one's hand briefly summarizing key Seaway trade and contact information,

complement the marketing brochure and are visually compelling; one palm card reiterates the 'Opportunity Belt' theme and the second palm card highlights the efficiency of maritime transportation.



An electronic copy of the new Marketing Brochure is available on the Seaway binational site (www.greatlakes-seaway.com) and at <http://bit.ly/1AO6J4k>. Paper copies of the

SLSDC Marketing Brochure and each of the SLSDC palm cards are available for delivery by submitting a request to Adam Schlicht, Economic Development Specialist, SLSDC Great Lakes Office (Cleveland), at adam.schlicht@dot.gov. ■■■

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provided the backhaul cargo that lured many small ocean ships loaded with iron and steel commodities to steel ports like Cleveland, Toledo, Detroit, and Milwaukee or Hamilton, Ontario. Afterwards, the ships typically headed to Thunder Bay (the Great Lakes St. Lawrence Seaway System's largest grain exporting port—which enjoyed its best season in 17 years) or the Twin Ports of Duluth-Superior to load again. Meanwhile, the Canadian laker fleet was busy moving wheat, soybeans and corn through Seaway locks to lower Laurentian ports for transshipment to overseas markets.

"The Great Lakes St. Lawrence Seaway System plays a strong role in facilitating economic growth throughout the Great Lakes Region, which is quickly becoming the 'Opportunity Belt' of North America," said Saint Lawrence Seaway Development Corporation's Administrator Betty Sutton. "In particular, the increases in iron and steel cargo this shipping season reflect new growth in manufacturing, construction, energy and other industries. The strong finish to the Seaway's 2014 navigation season contributed to the resurgence in the overall economy and foreshadows a positive outlook for increasing use of maritime transportation to move goods throughout the region."

The early weeks of the 2014 Seaway season were difficult due to the frigid weather and historic ice cover that blanketed more than 90 percent of the Lakes. When the late thaw began, commerce picked up in earnest and remained steady pretty much until season's end.

The Twin Ports of Duluth-Superior reported that "general cargo shipments ranked significantly higher than last year" and welcomed 14 vessels to its Clure Public Marine Terminal, noting "a tonnage increase of more than 200 percent" in that coveted category. Grain exports out of Duluth-Superior through November 30 had just exceeded 1 million short tons, about eight percent below the 2013 numbers.

The Cleveland-Cuyahoga Port Authority reported excellent figures (through mid-December) with 360 ships calling on its port versus 316 the previous year. That 14 percent jump in vessel calls reflects even more tonnage moved as officials there stated they expect "international shipping tonnage to increase 23 percent" over 2013 performance. Augmenting that positive news has been the exciting announcement last fall that Spliethoff, the Dutch company running the only container liner service between the Lakes and Europe, will begin running two ships per month in 2015.

"There is plenty of capacity on the St. Lawrence Seaway and Great Lakes ports," said William Friedman, port director of Cleveland-Cuyahoga Port Authority and current president of the American Great Lakes Port Association. "Before we spend billions to create more capacity elsewhere we should make investments here [as] we are a legitimate trade route."

Toledo reported a busy year with ships loaded with salt, steel, and pig iron routinely dropping anchor at Midwest Terminals. Backhaul cargo typically included corn and soybeans shipped by ADM and The Andersons to Canada via lakers prior to transshipment to foreign markets.

Milwaukee had its second best performance in steel tonnage handled in three decades, and sent soybeans to Turkey. It also welcomed three ships loaded with salt from Morocco, Venezuela, and Egypt instead of the typical Ontario and Ohio locations. Last year's "polar vortex" weather phenomenon promoted a run on road salt throughout the region in 2014 doubling and tripling prices and provoking foreign purchases for the first time in more than a generation.

Green Bay topped its 2 million ton 'good season' metric despite the shortened season and drops in coal and cement. Solid movements of sand, petroleum products, salt and limestone brought the good news.

Detroit saw ample quantities of steel coil, wire and beams cross its docks.

The Ogdensburg Port and Bridge Authority awarded North American Stevedoring Company, an affiliate of Quebec Stevedoring, management of its terminal last October.

The port of Erie had one of its most memorable years in decades moving two shipments of 10 General Electric locomotives each to Africa. Other notable project cargo included electrical transformers destined for Massena.

Michigan's Port of Muskegon welcomed four ships loaded with wind components that were unloaded and trucked to Beebe Wind Farm in the center of the state. Muskegon officially joined the American Great Lakes Ports last summer and hosted a reverse trade mission from The Netherlands in October, as the region seeks to increase agricultural exports to Holland.

Oswego handled double the aluminum tonnage it had been accustomed to and the figures are slated to continue to rise as Detroit auto manufacturers have begun swapping that metal for steel in chassis and panels.



Aluminum ingots stacked at the Port of Oswego doubled in tonnage during the 2014 navigation season.

Indiana's International Port at Burns Harbor reported in early December that steel traffic was up by 37 percent. Final numbers were the best in the port's 44 year history.

The 2014 season ending number for most of the U.S. ports in the System reflect a steady incremental improvement in tonnage handled. For decades economists and logisticians who study this waterway have noted that the Seaway accurately reflects the state of the larger national economy: if that is true, there is ample reason to be extremely optimistic that 2015 will be the indication of an even brighter season for maritime industry on North America's Inland Seas. ■ ■ ■

GUEST COLUMNIST BRENDA SANDBERG
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Much of what I have learned in these three short months reflects back to the title of this column; Similar yet Different. All of the Ports along the Seaway and in the Great Lakes provide a vital economic link between our communities and inland America to the rest of the world. How we accomplish that goal and on what scale are vastly different. Operations within the Port of Erie are similar to some ports in that we are the lessor to Donjon Shipbuilding and Repair as well as Carmeuse Lime and Stone. The Authority is also the Grantee for Foreign Trade Zone #247.

We differ because the Erie-Western Pennsylvania Port Authority also develops/owns/operates/manages and maintains recreational boating marinas, public boat launches, a campground, public parks and bike paths, as well as the Bicentennial Tower which has become the iconic symbol of Erie.

After only three short months, it is difficult to say what the future holds for the Port of Erie. It is my hope that we will continue to be efficient and focused when meeting consumer needs for the movement of goods. We must undertake both short and long term planning to fund ongoing

maintenance and the creation of new transportation infrastructure on both water and land. In addition, the Port of Erie will continue to be the steward of both public and private commercial development on Erie's Bayfront.

I have already had the privilege of meeting many of the Presidents, CEOs, and Executive Directors of the other Seaway and Great Lakes Ports. I appreciate all you have done to welcome me into this new role. I am looking forward to working with all ports to increase economic activity on the Seaway and the Great Lakes. ■■■

2014 HWY H₂O Conference: Building from a Strong Foundation



SLSDC Administrator Betty Sutton and Terence Bowles, President & CEO, The St. Lawrence Management Corporation, being interviewed by Ron Sampson, Marine Matters, during the HWY H₂O Conference.

Highway H₂O celebrated 10 years of building a strong foundation while stimulating the collective interests and business needs of partners and stakeholders. This year's HWY H₂O Conference took place November 19 & 20, 2014, at the Toronto Airport Marriot. This year's conference was the best attended to date with 152 delegates representing a wide range of professionals from all transportation modes.

Conference modules showcased insights on economic and trend based activities, a focus on policy and regulatory issues, the spectrum of infrastructure change and investment and finally, cargo diversification and market opportunity.

In recognition of the 10th year, a HWY H₂O awards ceremony was added to the second day of the conference. HWY H₂O Port Partners and Members were acknowledged by the SLSDC and SLSMC with a special anniversary plaque. We are very thankful for the continued support of our members. ■■■

Successful Binational Seaway Meeting Held between the U.S. and Canada

The U.S. Saint Lawrence Seaway Development Corporation (SLSDC) and Canadian St. Lawrence Seaway Management Corporation (SLSMC) met in Montreal, Quebec, in early December 2014 as part of the binational Joint Strategic Meeting (JSM) program. At each JSM meeting, the two organizations review, strategize, and plan to ensure the continuance of safe, efficient, and

productive shipping on the Great Lakes via the efficient operation of Seaway lock infrastructure.

In Montreal, senior leadership from both the SLSDC and the SLSMC presented on a number of topics, including shared plans for the continued modernization of the lock infrastructure through asset renewal, key marketing initiatives,

including the Hwy H₂O (www.hwyh2o.com) program as well as other stakeholder engagement endeavors, and other legal, policy, and operational changes enhancing and affecting shipping on the Great Lakes. The JSM program has been in place for over 10 years, and the next JSM meeting will be held in mid-2015 in the United States. ■■■

34th Binational Trade Mission

Make plans to attend the 34th Binational Trade Mission in Antwerp, Belgium on May 17–22, 2015. Over the last nine years, a delegation of Great Lakes stakeholders have attended the Breakbulk Europe Exhibition and this year the Seaway Corporations, The St. Lawrence Seaway Management Corporation (SLSMC) and the Saint Lawrence Seaway Development Corporation (SLSDC) have decided to incorporate the exhibition as part of our annual Trade Mission.

Our previous delegation included port directors, carrier executives, and other prospective trade partners which found attendance at the Breakbulk Exhibition to be very beneficial to further trade between HWY H₂O and Europe and combining these two events has provided an opportunity to reconnect and to forge new business relationships with our existing stakeholders and possibly meet new ones.

If you have any questions regarding the trade mission, please contact Gina Delle Rose-Ash, Market Development Specialist for The St. Lawrence Seaway Management Corporation, at (905) 641-1932 x 5438 or via email at gdelleroseash@seaway.ca. ■■■

Robert J. Lewis Pacesetter Award Nominations

The Saint Lawrence Seaway Development Corporation (SLSDC) is looking forward to recognizing those U.S. Great Lakes Seaway System ports that increased international tonnage during the 2014 navigation season with its annual Robert J. Lewis Pacesetter Award. The SLSDC recently mailed its annual questionnaire to all U.S. Great Lakes Seaway System ports to identify qualified recipients.

The SLSDC Pacesetter Award was established in 1992 to recognize the achievements of U.S. ports whose aggressive marketing activities resulted in increasing international tonnage shipped through the St. Lawrence Seaway in comparison to the previous year. Over that time, the SLSDC has distributed more than 100 Pacesetter Awards to Great Lakes Seaway ports.

If you have any questions regarding how you can qualify or if you did not receive your questionnaire, please contact Ian Serguson in the SLSDC's Office of Budget and Economic Development by either calling (202) 366-6510 or email, ian.serguson@dot.gov. ■■■



Hosts Administrator Betty Sutton, SLSDC, and Terence Bowles, SLSMC enjoyed meeting with all the Great Lakes Seaway System stakeholders.

Saying Thank You to our Great Lakes St. Lawrence Seaway System Stakeholders

The Saint Lawrence Seaway Development Corporation and The St. Lawrence Seaway Management Corporation were honored to have so many supporters from the Great Lakes St. Lawrence Seaway System attend the annual Stakeholder Appreciation Reception, Montreal, QC, December 4, 2015. This year's event was our largest to date, with 245 attendees. The Appreciation Reception continues to be an exceptional opportunity for networking with industry leaders from around the world. It is also an opportunity for the two Corporations to say thank you for your continued support in keeping cargo moving throughout the Seaway System and our Great Lakes ports. ■■■



Positive Changes for Cruise Ships Operating on the Great Lakes Seaway System

After many years of work and, thanks in large part to the efforts of Rebecca Spruill, International Trade Specialist at the Saint Lawrence Seaway Development Corporation, there has been significant progress to advance cruise shipping on the Great Lakes.

During 2014, the U.S. Customs and Border Protection Agency (CBP) made great strides to improve the clearance process for cruise ships arriving from a foreign country. In February 2014, CBP announced that the Great Lakes St. Lawrence Seaway System (GLSLSS) would be included in the Closed Loop Program and in November, CBP announced a new pilot project identified as the “Great Lakes Seaway Cruise Ship Inspection” with procedures to be implemented in March 2015. These initiatives will provide a great opportunity to increase the number of cruise ship on the Great Lakes and deliver economic benefit in our port cities.

What drove these changes was the need for CBP to recognize that the GLSLSS is a unique waterway, with different challenges when compared to coastal cruising. Great Lakes cruising is not year-round. Currently the number of ships sailing the Great Lakes are fewer than on the coasts, and the average number of passengers per ship is less than 200. Coastal ports have invested millions of dollars in passenger terminals and a significant amount of financial support has come from the private sector, such as Norwegian, Carnival and Royal Caribbean Cruise Lines. These coastal cruise terminals are handling hundreds of cruise ships and thousands of passengers on a daily basis. On the Great Lakes, the Port of Detroit is the only U.S. location

with an operational passenger terminal. Becoming compliant with CBP regulations has been a continuous financial struggle for the port; currently there are not enough ships to cover the cost.

For the cruise business to grow, we needed CBP to develop a program specific to the Great Lakes. Efforts began several years ago when the Great Lakes Cruising Coalition and the Saint Lawrence Seaway Development Corporation conducted a series of educational meetings with CBP about the cruising industry on the Great Lakes. Each meeting got us a little bit closer to our goal—a program that would allow our non-compliant ports the flexibility to receive and clear cruise ships and their passengers arriving from Canada.

The first breakthrough came in February when CBP incorporated the Great Lakes into the “Closed Loop Program”. By definition, a closed loop occurs when a cruise ship departs from a U.S. port and returns to the same U.S. port upon completion of its voyage. Closed Loop allows flexibility in the clearance process when a cruise ship visits multiple foreign ports. CBP agreed that this program is a perfect fit for the GLSLSS because most Great Lakes cruise ships bounce back and forth between the U.S. and Canada. However, CBP had to change the current regulatory language because a typical Great Lakes cruise will commence in either Canada or the U.S. and end in the opposite country of where it started.

The second and most substantial change in the clearance process for the GLSLSS can be attributed to technology and a small device called a “jump kit.” Basically, the jump kit connects to the

Wi-Fi, the passenger slides four fingers into the device, and the fingerprints are electronically scanned and forwarded to a database for evaluation. The jump kit is used only once during the entire voyage and that occurs at the ship’s initial port call in the U.S. All other U.S. port calls following a stop in Canada will result in CBP greeting the ship and going onboard to conduct a visual scan of the passengers’ passports. This process eliminates the need for our ports to develop multi-million dollar passenger terminals.

Although the jump kit provides enormous flexibility there are still some limitations for cruise ships arriving from Canada. There has to be CBP representation at the arriving port, and for our smaller ports like Mackinac Island, Charlevoix and Holland Michigan, this is a problem. CBP is willing to work with the cruise line on a case by case basis.

Industry leaders throughout the GLSLSS are praising CBP for the attention it’s given to the cruise ship industry on the Great Lakes. At the end of the 2015 navigation season, CBP will turn to our ports, agents, ship owners and operators for their feedback on the program. They will want to know what worked and what didn’t and how they can enhance the program. If all goes well, the pilot project will be extended into 2016.

Again, congratulations to Rebecca Spruill and everyone who was a part of this effort. ■ ■ ■

New Congress Update

Members of the 114th Congress were officially sworn into office on January 6, 2015. While organizational meetings of the committees are still underway, there are a number of noteworthy changes with respect to the makeup of the House and Senate Great Lakes delegation.

In New York's 21st Congressional District, which includes Massena (the location of the U.S. Seaway locks) Rep. Elise Stefanik (R) won the seat of Rep. Bill Owens, who retired at the end of the 113th Congress. She is the youngest woman ever elected to the House of Representatives. Other retiring House Members from the Great Lakes included Rep. Dave Camp (R-MI), Rep. John Dingell (D-MI), Rep. Carolyn McCarthy (D-NY), Rep. Tom Petri (R-WI) and Rep. Mike Rogers (R-MI). Great Lakes House Members who lost their re-election bids include Rep. Tim Bishop (D-NY), Rep. Dan Maffei (D-NY) and Rep. Brad Schneider (D-IL).

There is also a new U.S. Senator joining the delegation; Senator Gary Peters (D-MI), takes over the seat of retired Senator Carl Levin of Michigan.

In addition, there are two new Great Lakes Governors; Governor Bruce Rauner (R-IL) who defeated Pat Quinn and Governor Tom Wolf (D-PA), who defeated Tom Corbett.

With regard to leadership of important House and Senate Committees, here is a quick summary:

- **Senate Commerce, Science and Transportation Committee**

Chair: Senator John Thune (SD); Ranking Member—Senator Bill Nelson (FL)

- **House Transportation and Infrastructure Committee**

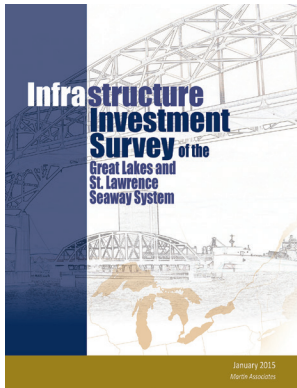
Chair: Rep. Bill Shuster (PA); Ranking Member—Rep. Peter DeFazio (OR)

- **Senate Environment and Public Works Committee**

Chair: Senator Jim Inhofe (OK); Ranking Member—Senator Barbara Boxer (CA) ■■■



New Infrastructure Investment Study Released



The results of a year-long infrastructure investment survey were released in mid-January by the American Great Lakes Ports Association and the Canadian Chamber of Marine Commerce. The survey was commissioned by a coalition of U.S. and Canadian Great Lakes-Seaway maritime industry stakeholders, and was conducted by Martin Associates of Lancaster, Pennsylvania.

The purpose of the survey was to document the level of public and private sector investments being made throughout the navigation system. More than 600 entities, including vessel operators, ports, terminals, and government agencies were contacted. The survey quantifies investments made over the past five years (2009–2013), as well as amounts already committed for future years. Data is broken out by industry sector, by country, by state and province, and by public vs. private sector.

Fast Facts

- A total of \$7 billion is being spent on asset renewal and infrastructure improvements by both public and private sectors.
- Between 2009–2013, more than \$4.7 billion has been invested in ships, ports and terminals, and waterway infrastructure.

- An additional \$2.2 billion has been committed for infrastructure investments in the system by companies and governments.
- American, Canadian and international ship owners are spending more than \$4 billion on the biggest renewal of the Great Lakes fleets in 30 years.
- Total port, terminal and waterway infrastructure investments by state and province is \$2.9 billion.

Here is the link to the survey:

http://issuu.com/slsdc/docs/investment_survey_final_version__20 ■■■

Upcoming Events

February

February 24–26

Great Lakes Commission Semiannual Meeting and Great Lakes Day

Washington, D.C.

Contact: <http://projects.glc.org/greatlakesday>

March

March 16–19

Cruise Shipping Miami

Miami, FL

Contact: <http://www.cruiseshippingevents.com/en/miami/conference/conference-program>

April

April 26–28, 2015

Council of the Great Lakes Region—Great Lakes Economic Forum

Contact: <http://councilgreatlakesregion.org/economic-forum>

May

May 27–29, 2015

Green Marine—GreenTech 2015 Conference

Seattle, WA

Contact: <http://www.green-marine.org/greentech>

May 17–22, 2015

34th Binational Trade Mission

Antwerp, Belgium

Contact: Gina Delle Rose-Ash:
(905) 641-1932 x 5438 or
gdelleroaseash@seaway.ca

May 5–6, 2015

St. Lawrence River Institute of Environmental Sciences—22nd Annual River Symposium

Contact: <http://riverinstitute.ca/river-symposium/program-speakers>