



GREAT LAKES- ST. LAWRENCE SEAWAY

North America's Link
to Prosperity



MARINETM
DELIVERS



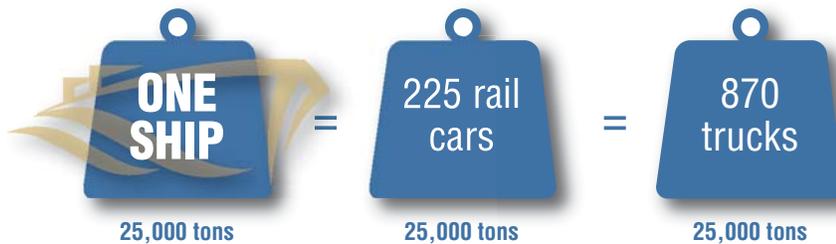
THE GREAT LAKES-ST. LAWRENCE SEAWAY NAVIGATION SYSTEM

A Vital North American Trade Route

The five Great Lakes and the St. Lawrence Seaway combine to form an efficient, low-cost marine super-highway that supports North America's industrial heartland and serves a consumer market of more than 100 million people.

The Great Lakes-Seaway navigation system is the longest deep-draft navigation system in the world — extending 3,700 kilometres and bordering two Canadian provinces (Ontario and Quebec) and eight U.S. states (Indiana, Illinois, Michigan, Minnesota, New York, Ohio, Pennsylvania and Wisconsin).

There are more than 100 commercial ports in the navigation system. These facilities serve as gateways for waterborne commerce moving within the region or between North America and overseas destinations.



SHIPPING
= **\$34.6 BILLION**
IN ECONOMIC
ACTIVITY



Saving Consumers Money

The economic benefits of marine transportation on the Great Lakes are far-reaching. North American farmers, steel producers, construction firms, food manufacturers and power generators depend on the 164 million metric tons of iron ore, coal, stone, salt, sugar, grain, steel, wind turbines and machinery that are delivered by Great Lakes ships every year to keep their businesses running.

Marine transportation is the most economical mode of commercial freight transportation for these industries. For example, a maximum Seaway-size Laker can carry 25,000 metric tons per voyage, which is the equivalent of 225 rail cars or 870 semi-trailer trucks. This efficiency of Great Lakes ships translates into lower costs for the companies that use marine transportation and, ultimately, for North American consumers. According to a U.S. Army Corps of Engineers study¹, Great Lakes marine shipping saves companies approximately \$3.6 billion per year in transportation costs compared to the next least-costly, land-based alternative.

ECONOMIC CONTRIBUTION

Delivering Wealth to Great Lakes Communities

The most recent economic data² show that cargo shipments on the Great Lakes-Seaway system generate \$34.6 billion of economic activity within the adjoining two Canadian provinces³ and eight U.S. states.

Marine transport-related activities on the waterways create more than 227,000 jobs and generate \$14.5 billion in salaries and wages in the two countries.

The revenue generated by the marine sector gives rise to \$4.7 billion in income and corporate tax payments. In 2010, the marine sector raised Canadian government tax receipts in total by \$2 billion and increased U.S. government budget revenues by \$2.7 billion.

Great Lakes-Seaway Navigation System Economic Impacts — 2010 (CDN\$)

	In Canada	In the United States	Combined Economic Benefit
Employment (Direct, Induced and Indirect)	98,000 jobs	129,000 jobs	227,000 jobs
Economic Contribution (Business Revenue)	\$15.9 billion	\$18.7 billion	\$34.6 billion
Personal Income (Wages & Salaries)	\$4.6 billion	\$9.9 billion	\$14.5 billion
Federal Taxes	\$1.4 billion	\$1.8 billion	\$3.2 billion
State/Provincial and Local Taxes	\$0.6 billion	\$0.9 billion	\$1.5 billion
Total Taxes Paid	\$2.0 billion	\$2.7 billion	\$4.7 billion

1 Great Lakes Navigation System: Economic Strength to the Nation, U.S. Army Corps of Engineers (January 2009)

2 The Economic Impacts of the Great Lakes-St. Lawrence Seaway System, Martin Associates (October, 2011). Full study at: www.marinedelivers.com.

3 Quebec calculations include economic impacts related to cargo transiting the St. Lawrence Seaway only, and not the Lower St. Lawrence River.

MARINE SHIPPING KEEPS NORTH AMERICA WORKING

Creating Employment from Ship to Shore

In addition to helping keep the Canadian and U.S. economies competitive, Great Lakes-Seaway shipping generates more than 227,000 direct, indirect and induced jobs in the two provinces and eight states that border the system.

Direct, Induced and Indirect Jobs by Country

	Total	Canada	United States
Direct	93,000	48,000	45,000
Induced	66,000	22,000	44,000
Indirect	68,000	28,000	40,000
Total	227,000	98,000	129,000



Direct Jobs Impact

Some 93,000 jobs are directly dependent on the cargo handled at the ports and marine terminals on the Great Lakes-Seaway navigation system.

Direct Jobs by Sector and Country

	Total	Canada	United States
Marine Operations and Services	35,000	16,000	19,000
Cargo Shippers	42,000	25,000	17,000
Truck and Rail Transportation	16,000	7,000	9,000
Total	93,000	48,000	45,000

- Marine Operations And Services — 35,000 jobs:** Waterborne shipping is supported by employees in a wide range of operational and service-related professions. These include environmental managers, safety inspectors and lock operators, as well as workers at ship-repair and parts companies. Chandlers provide food and supplies to ships stopping in port, while longshoremen, terminal and warehouse workers unload and process cargo for its next destination. In addition, port, Seaway and government-agency staff oversee critical infrastructure, manage operations and enforce regulations.
- Cargo Shippers — 42,000 jobs:** Marine shipping is directly connected to employment in steel mills as well as iron ore and salt mines, which are located near ports and are highly dependent on receiving products by water. Out of the 93,000 direct jobs created by Great Lakes-Seaway marine activity in Canada and the U.S., half of these are in companies that ship products on the system. For example, the movement of iron ore from mines in Quebec, Michigan and Minnesota to ports throughout the system directly creates about 17,000 jobs in Canadian steel mills and about 12,000 jobs in American steel mills. Manufacturers have specifically located their plants on the Great Lakes to have direct access to waterborne transportation. Without this service, these jobs would be at risk.
- Truck and Rail Transportation — 16,000 jobs:** Many Great Lakes-Seaway ports are intermodal hubs that have on-site rail and trucking links to take goods on the next leg of their journey to inland destinations. Great Lakes shipping is responsible for 13,500 jobs at trucking firms and 2,500 positions at railroads.

SHIPPING
=
227,000
JOBS

The Employment Ripple Effect

The local purchases made by industry-related employees lead to another **66,000 induced jobs** in restaurants, shops and other businesses in communities situated near the Great Lakes and the Seaway.

Great Lakes marine businesses spend \$6.6 billion on goods and services such as maintenance and repairs, utilities and professional services in Canada and the U.S., creating an additional **68,000 indirect jobs**.



MARINE – SUPPORTING NORTH AMERICAN INDUSTRIES

Transporting over 164 million metric tons per year

IRON ORE — Over 60 million metric tons of iron ore — all used in the production of steel — account for the largest volume of cargo shipped through the Great Lakes-Seaway navigation system. The system handles more than 80 per cent of the iron ore used in the U.S. steel industry; and supports the activities of more than 60 steel manufacturers in Ontario. This steel, in turn, is used to build schools, hospitals and bridges; and to produce automobiles and numerous other consumer goods.

GRAIN — North American farmers depend on Great Lakes-Seaway shipping to move approximately 11 million metric tons of wheat, barley, soybeans and corn to domestic and international markets each year — about 10 per cent of the combined total of all Canadian and U.S. grain exports. These crops are made into beer and ethanol fuel in the U.S., bread in England, pasta in Italy and couscous in Morocco.

AGGREGATES & CEMENT — Over 26.5 million metric tons of construction materials such as aggregates and cement are transported annually between ports situated on the system. These materials are used for highway construction and other infrastructure projects.

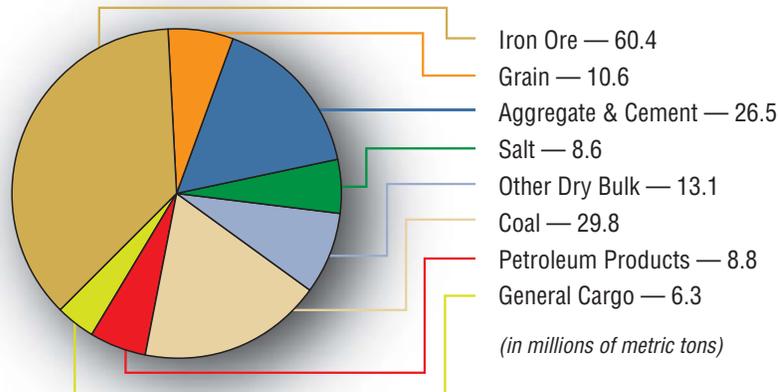
SALT — Each year, more than 8.5 million metric tons of salt are transported by vessels to cities and communities throughout the Great Lakes region to keep icy roads safe during the winter months and to season food on the dinner table. The majority of salt is produced at mines located in Ontario and Michigan.

SUGAR — More than 500,000 metric tons of bulk raw sugar are transported each year to Great Lakes ports in Seaway-size ocean-going vessels. Once refined in Canada, this sugar is sold on supermarket shelves and is used as a staple ingredient in baked goods and other food and drink products.

COAL — Close to 30 million metric tons of coal are shipped through the Great Lakes-Seaway navigation system each year. This coal is vital for steel production, as well as for power generation in both Canada and the U.S. One 1000-foot-long vessel carrying 63,000 metric tons delivers enough coal to power Greater Detroit for one day.

PETROLEUM PRODUCTS — Approximately nine million metric tons of refined products such as gasoline, diesel fuel and heating oil move through the Great Lakes-Seaway navigation system each year. These products, among other uses, supply gas stations and provide heating for homes throughout the region.

GENERAL CARGO — The Great Lakes-Seaway system handles imports and exports of general cargo — including forest products, steel and project cargo — totalling approximately six million metric tons annually. Marine shipping makes a major contribution to green energy, as the safest and most cost-effective way of transporting giant wind turbine components to new power projects near the Great Lakes and interior provinces and states.



QUICK FACTS

Great Lakes-Seaway marine shipping in Canada and the U.S.:

- ***Creates 227,000 jobs*** •
- ***Produces \$34.6 billion in economic contribution annually*** •
- ***Generates \$14.5 billion in employment wages annually*** •
- ***Contributes \$4.7 billion in federal, state/provincial and local taxes every year*** •
- ***Moves 164 million metric tons of essential raw materials and finished products annually*** •
- ***Saves cargo shippers \$3.6 billion in transportation costs every year*** •



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