



The Great Lakes - St. Lawrence Seaway System

2026 Season To Date

Presented by the Great Lakes St. Lawrence Seaway Development Corporation (GLS) for the Wisconsin Commercial Ports Association (WCPA)

September 11, 2026





Bi-National Partnership & Economic Value

Great Lakes St. Lawrence Seaway System

Operations & Reach

- Jointly operated by the U.S. and Canada **since 1959**.
- Serves **8 U.S. states** and **2 Canadian provinces**.

Economic Value

- Supports over **329,000 jobs** and generates **\$59 billion** in annual economic activity bi-nationally.
- The U.S. portion supports **147,000+ U.S. jobs** and generates **\$26 billion** in annual U.S. economic activity.

LEGEND

LOCKS

US Operated

- 5 Snell
- 6 Eisenhower
- 9 Soo Locks

Canadian Operated

- 1 St. Lambert
- 2 Cote Ste. Catherine
- 3 Lower Beauharnois
- 4 Upper Beauharnois
- 7 Iroquois
- 8 Welland Canal

MAJOR PORTS

GREAT LAKES AND ST. LAWRENCE SEAWAY NAVIGATION SYSTEM





Strategic Vision

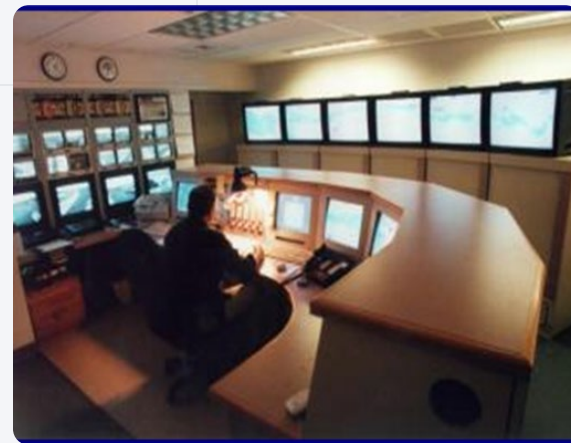
Tech Dominance & Modernization

Vessel Information System (VIS)

- Developing a new, state-of-the-art Vessel Information System (VIS) in partnership with the Canadian Seaway (SLSMC).

Centralized Lock Operations

- Initiating the conversion of U.S. locks to centralized remote-control operations to increase efficiency.
- Focus on leveraging private-sector innovation and U.S. tech dominance.





Critical Infrastructure

Bi-National St. Lawrence Seaway Specifications

15

Locks

Features 15 bi-national locks: 13 operated by Canada, and 2 by the United States (Eisenhower and Snell).

HFM

Mooring Tech

Equipped with state-of-the-art Hands-Free Mooring technology across all 15 locks for enhanced safety.

99.3%

Reliability

U.S. transit system reliability remains exceptionally high at **99.3%**.





2026 Cargo Trade Trends & Performance

Maritime Logistics Tonnage and Commodity Insights

37.0 M

TONNES 2025

Seaway tonnage in 2025 season: **37.023M tonnes**, representing a **5.31% YOY decrease**.

20.74 M

TONNES 2026 YTD

Seaway tonnage YTD in 2026: **20.74M tonnes**, representing a **2.63% YOY increase**.

+7.10 %

TRANSITS

Vessel transits show a positive **7.10% YOY increase**, demonstrating steady maritime traffic volume.

GAINS

DRY BULK +17% YOY

COMMODITIES:

Cement: **+32% YOY**

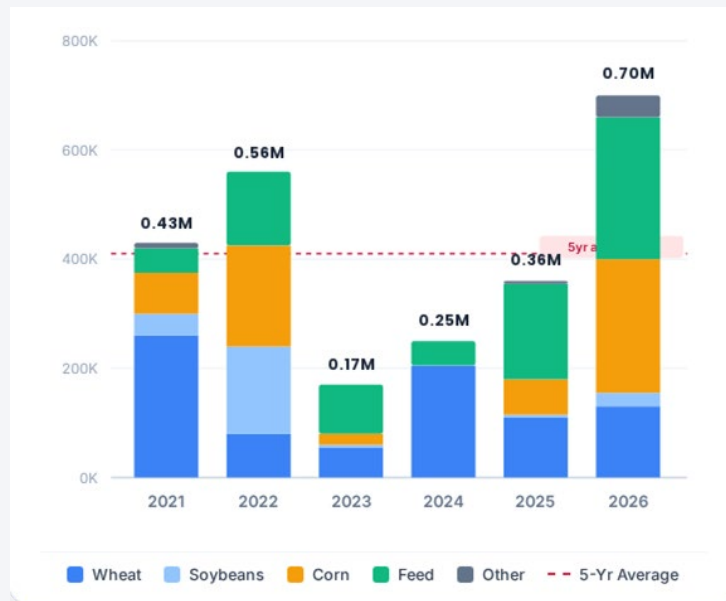
Salt: **+51% YOY**

Potash: **+33% YOY**



U.S. Grain Exports

A Powerful Trade Engine



+ 100 %

Surge in U.S. Grain Exports YOY (YTD 2026)

728K tonnes YTD through August 31, 2026, vs. 363K tonnes in 2025

Market Driver

Driven by strong U.S. corn exports.

Transit Share

56% (67 transits) of the 120 completed foreign export shipments exiting the Great Lakes YTD through mid-July 2026 were agricultural products.

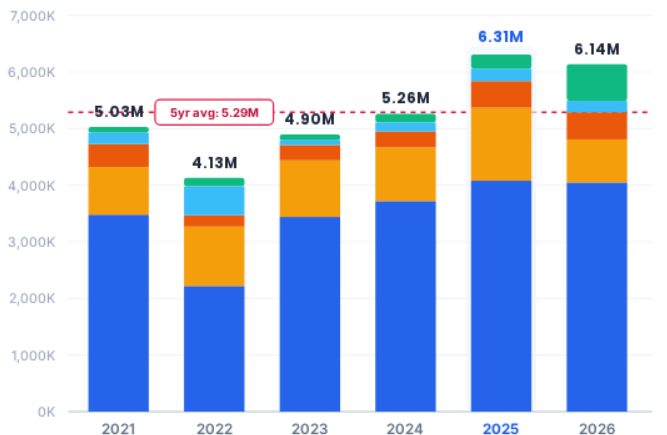


YTD Grain Overview

System-wide agricultural export volume by key commodities

Shipment Volume by Commodity

Metric Tonnes (000s)



■ Wheat ■ Corn ■ Canola ■ Soybeans ■ Feed & Others --- 5-Yr Avg (5.29M)

Peak Volume

6.31M

+19.3% vs 5 -Yr

5-Yr Benchmark

5.29M

Baseline

Wheat Share

66%

Volume Anchor

Key Performance Insights

Multi -Year Volume Expansion

After a 2022 trough of **4.13M** tonnes, shipments surged **+52.8%** through 2025.

Wheat Serves as Structural Anchor

Steady growth from **2.22M** (2022) to over **4.0M** tonnes, anchoring 2/3 of throughput.

Coarse Grain & Oilseed Diversification

Corn/Canola added **~1.76M tonnes** in 2025, with feed specialty buffering 2026.

Global Connection & Transit Metrics

2026 YTD Seaway Trade Trends

536

Vessel Transits

Through U.S. locks between Great Lakes and foreign markets.

33

Global Partners

Countries actively trading with Great Lakes ports.

276

Inbound Transits

Foreign-flagged vessel transits into the Seaway System.

220

Export Transits

Vessel transits exiting the Seaway System with exports.



GREAT LAKES CRUISE SEASON

2026 Projected to Set Records for Regional Cruising



>23,000

▲ +5% over 2025

PASSENGER CAPACITY

Regional passenger bookings are forecasted to reach historic highs, reflecting growing demand.

>\$300M

▲ +25% over 2025

ECONOMIC IMPACT

Total economic benefits across maritime communities are projected to surpass \$300 million USD.

800+

Port Visits Planned

MARKET EXPANSION

American Cruise Lines enters the market, driving a major expansion of local port stops and infrastructure.



Expanding Horizons

New Cruise Destinations Map

Active Expansion

2026 Season

- Buffalo, NY
- Ogdensburg, NY
- Oswego, NY
- Rochester, NY
- Sheboygan, WI

Future Horizons

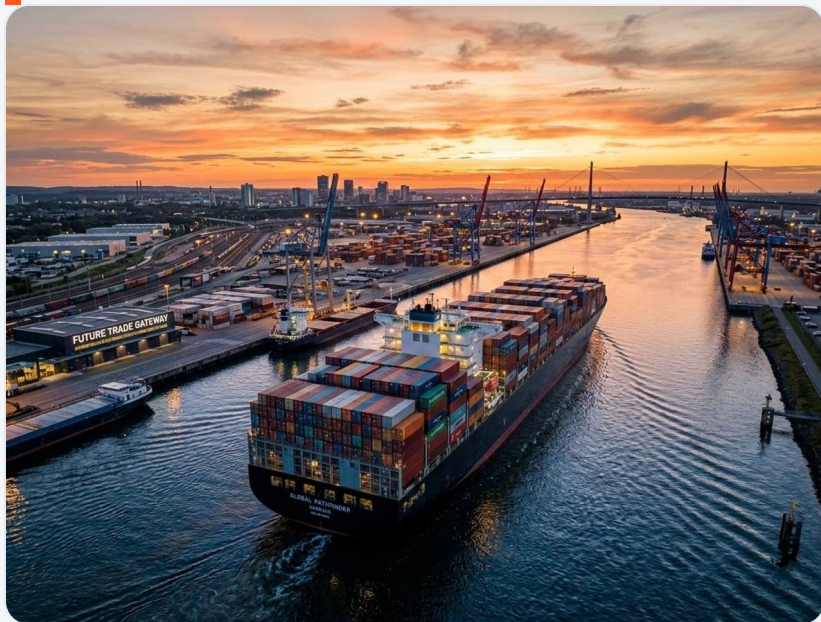
2028 & Beyond

- Erie, PA
- And many more

The regional cruise partnership continues to broaden its footprint, adding historic ports and developing infrastructure to accommodate record passenger growth.



Thank You!



Questions?

Feel free to reach out with any inquiries or feedback.

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