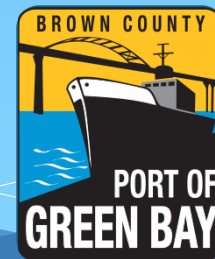


The Economic Impacts of Great Lakes/St. Lawrence Seaway System & The Port of Green Bay



GREAT LAKES ST. LAWRENCE SEAWAY SYSTEM



2014 Great Lakes Profile

Chart 1

Facts and Figures

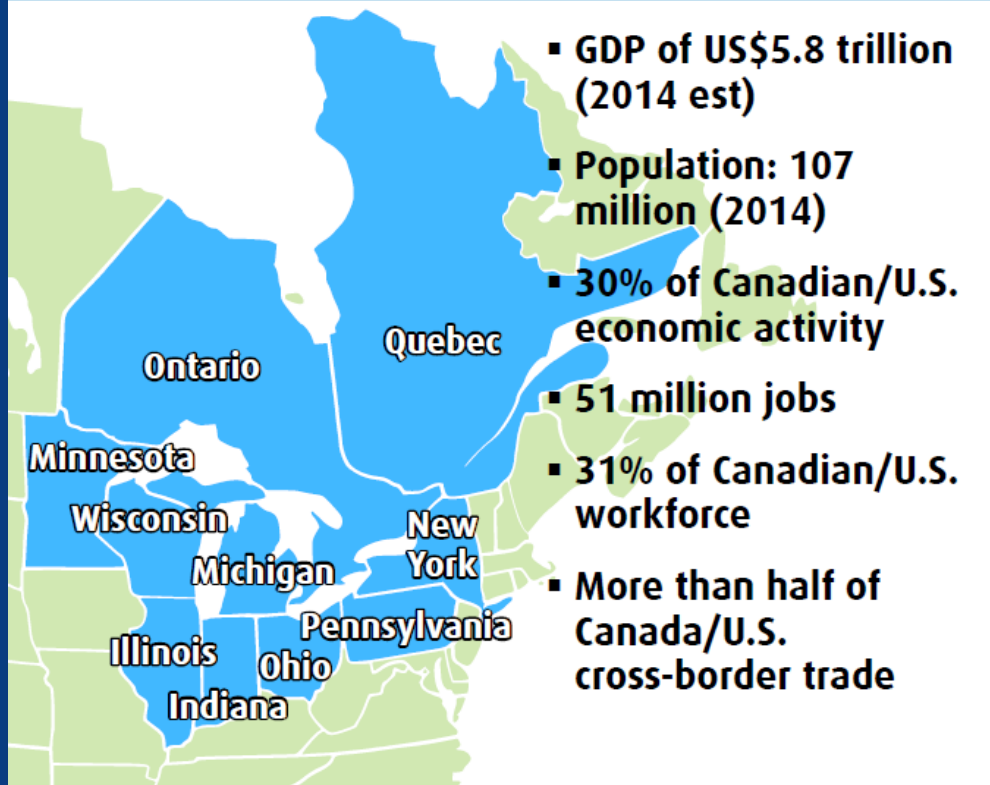
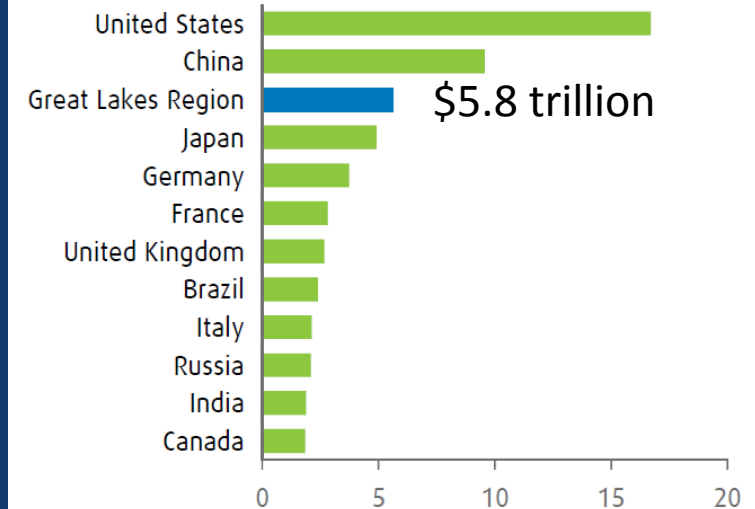


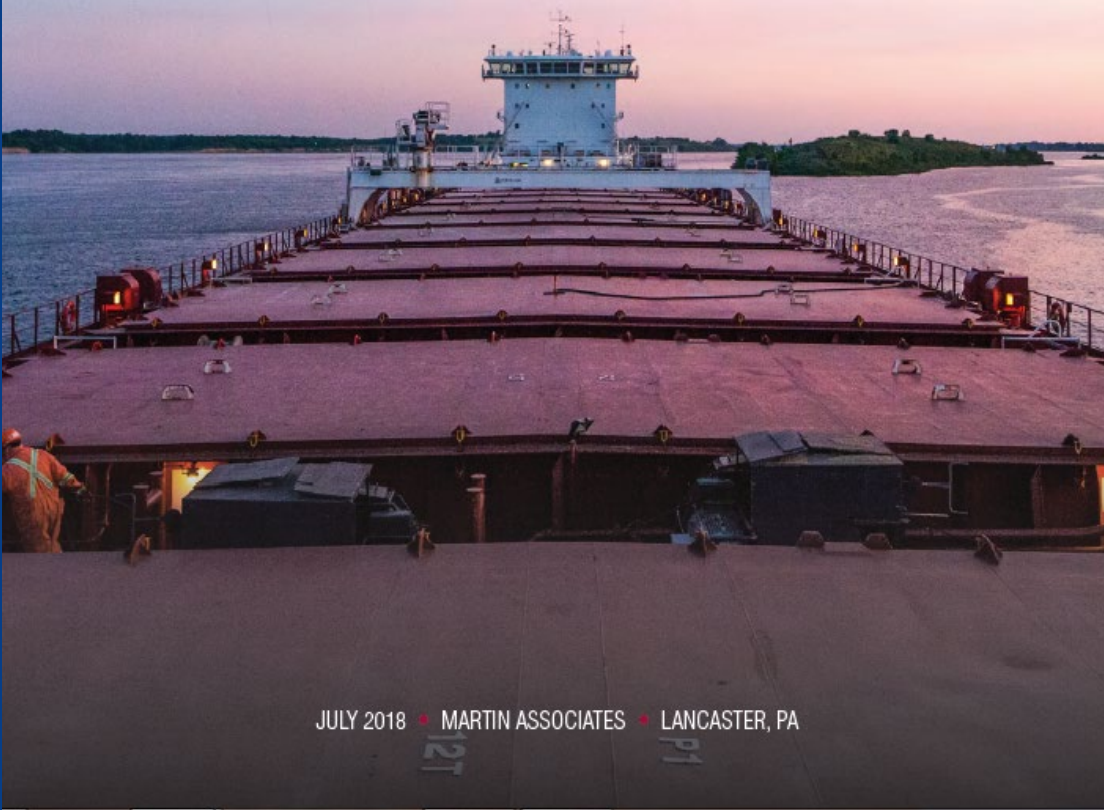
Chart 2

Gross Domestic Product

2013 (US\$ trlns)



ECONOMIC IMPACTS OF MARITIME SHIPPING in the GREAT LAKES - ST. LAWRENCE REGION



JULY 2018 • MARTIN ASSOCIATES • LANCASTER, PA

2017 Economic Impacts

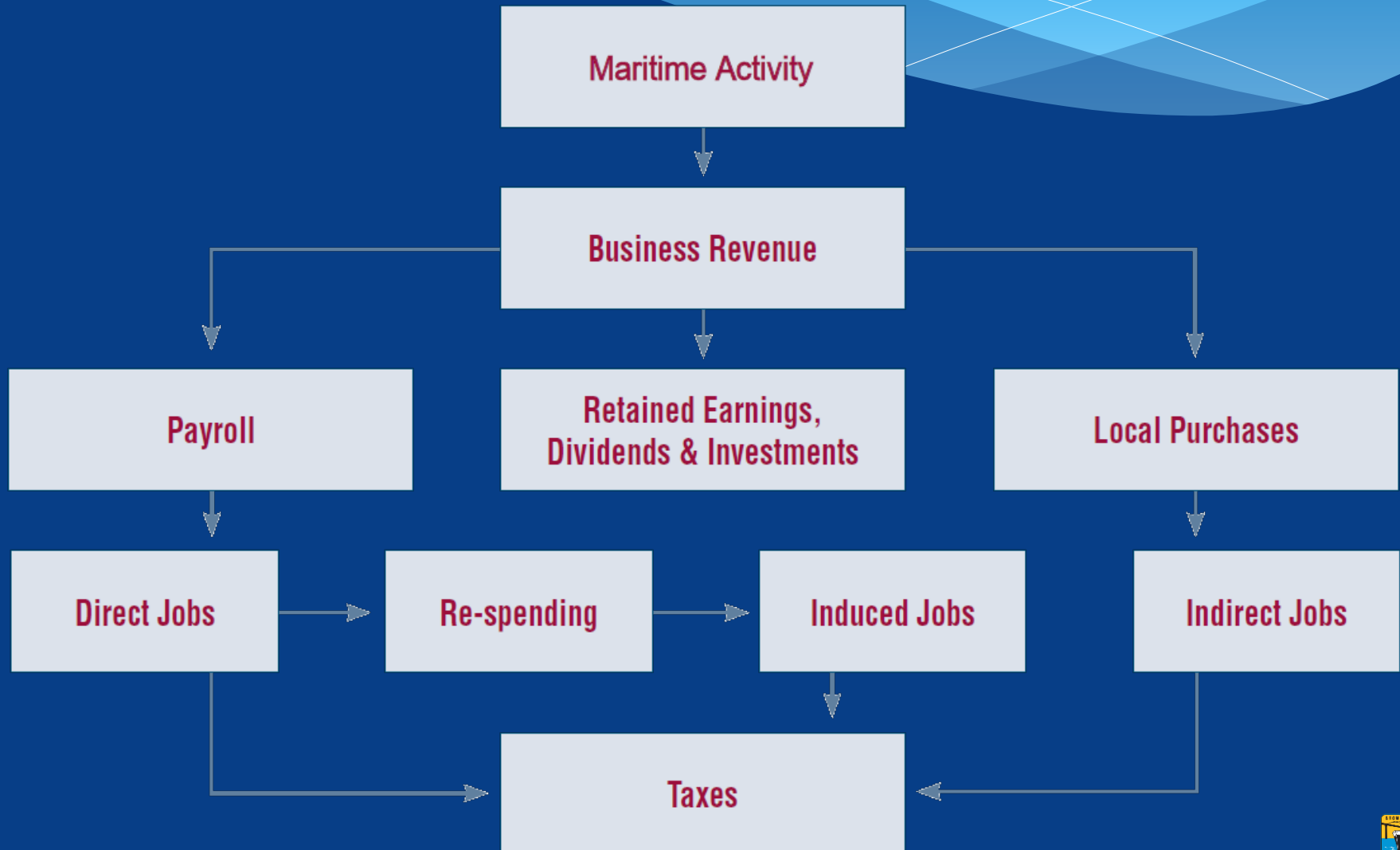
- * System level
- * Bi-national
- * State/Province

Impacts estimated by:

- * Total operations (domestic and international)
- * By flag
- * Saint Lawrence Seaway
- * Soo Locks
- * Special analysis of Quebec port operations



FLOW OF ECONOMIC IMPACTS



IMPACT METHODOLOGY

Interviewed 770 firms with 1,105 operations to develop direct impacts:

- * Jobs
- * Income
- * Revenue
- * Local purchases
- * Terminal operational specifics
 - Terminal operations by commodity
 - Modal splits
 - Hinterland distribution patterns
 - Rail and truck rates
- * Laker, tug and barge models

IMPACT METHODOLOGY

Commodity specific

- * General cargo/containers
- * Steel products
- * Iron ore
- * Grain
- * Stone/aggregates
- * Cement
- * Salt
- * Other dry bulk
- * Other liquid bulk
- * Coal
- * Petroleum products

Maritime Services

- * Terminal operators
- * Dockworkers/ILA
- * Tug Assists
- * Pilots
- * Agents
- * Freight Forwarders
- * Marine construction/shipbuilding and repair
- * Miscellaneous maritime services - surveyors, chandlers
- * Government
- * Ferries

Surface Transportation

- * Rail
 - * Truck
- Port Authority
Dependent shippers/
consignees (port
tenants)

ECONOMIC IMPACTS

237,868 jobs are supported by marine activity in the system

- 78,400 direct jobs
- 80,343 induced jobs
- 79,126 indirect jobs

\$35.0 Billion of total economic value supported in the region

- \$28.1 billion of direct business revenue
- \$6.9 billion of re-spending of direct income and local consumption

\$14.2 billion total personal income/local consumption

- \$3.8 billion: direct personal income, average salary = **\$62,870**
- \$6.9 billion: re-spending/local consumption
- \$3.5 billion: indirect income

\$6.6 billion federal, state and local taxes

- \$2.1 billion: state/provincial and local level
- \$4.5 billion: federal

ECONOMIC IMPACTS
of the
**PORT OF
GREEN BAY**



• August, 2018 •

JOB IMPACTS

- * 1,289 jobs in Wisconsin were supported by cargo moving via the marine terminals located at the Port of Green Bay
- * 564 jobs were directly generated by the marine cargo and vessel activity at the marine terminals
- * An additional 404 induced jobs were supported through local and regional purchases
- * 321 indirect jobs were supported by businesses supplying services

REVENUE IMPACTS

- * In 2017, the direct business revenue received at the Port of Green Bay was \$105.1 million
- * These firms provide maritime services and inland transportation services

PERSONAL INCOME & LOCAL CONSUMPTION IMPACTS

- * **564** individuals directly employed as a result of the cargo handled at the Port of Green Bay received **\$25.6** million in wages & salaries
- * Using the local personal earnings multipliers, **\$42.6** million in income and consumption were created by the Port of Green Bay
- * **321** workers indirectly employed received wages & salaries of **\$14.4** million
- * The total cargo handled at the Port generated **\$82.6** million in wages and salaries, and local consumption expenditures in the regional economy.

TAX IMPACTS

- * A total of **\$32.5** million in state and federal taxes generated by cargo and vessel activity
- * **\$9.1** million generated at the state level
- * **\$23.4** million generated at the federal level

TOTAL ECONOMIC IMPACTS - 2017

Personal Income (1,000)

Direct	\$ 25,577
Re-Spending/Local Purchases	\$ 42,593
Indirect	\$ 14,392
Total	\$ 82,562
Total Income from Jobs	\$ 39,969

Business Revenue (1,000)	\$ 105,133
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Local Purchases (1,000)	\$ 34,663
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Taxes (1,000)

Federal	\$ 23,436
State	\$ 9,082
Total Taxes	\$ 32,518

Jobs

Direct Jobs	564
Induced	404
Indirect	321
Total Port-Related Jobs	1,289

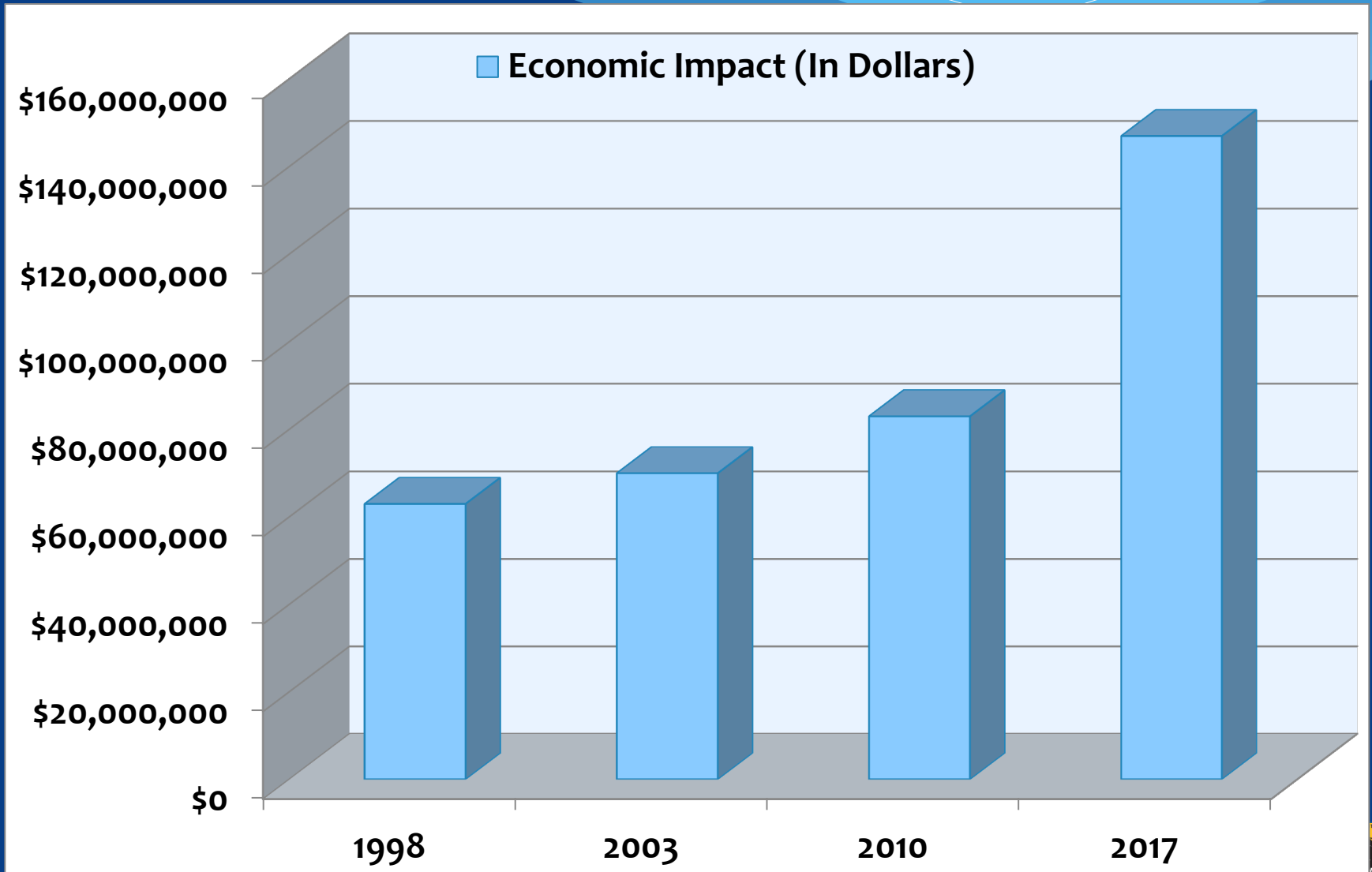
Commercial Vessel Arrivals	166
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Total Economic Impact	\$ 147,726
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ECONOMIC IMPACTS 2010-2017

	2010	2017
Jobs		
Direct Jobs	506	564
Induced		404
Indirect	317	321
Total	823	1,289
Personal Income (1,000)		
Direct	\$ 18,628	\$ 25,577
Re-Spending/Local Purchases	\$ 23,732	\$ 42,593
Indirect	\$ 8,033	\$ 14,392
Total	\$ 50,393	\$ 82,562
Business Revenue (1,000)	\$ 83,430	\$ 105,133
Local Purchases (1,000)		\$ 34,663
Taxes (1,000)		
Federal	\$ 12,298	\$ 23,436
State	\$ 5,106	\$ 9,082

ECONOMIC IMPACT 1998-2017



OPPORTUNITIES FOR THE PORT

- Expanding Port Operations
- Property Acquisition
- Container Services
- Beneficial Reuse of Dredge Material
- New Commodities
- Higher Value Goods – Steel, Fertilizer, Ag. Products
- Renard Island

Thank You

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