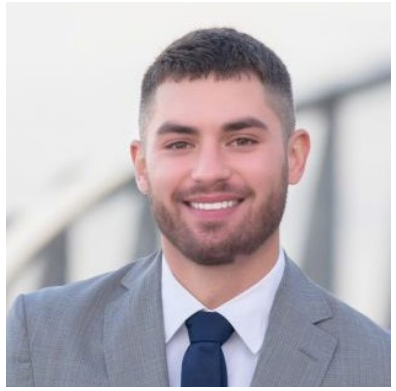
Breakout Session Two
U.S. River Systems: Challenges and Opportunities

Mary Lamie
Executive Vice President
Multimodal Enterprises



Anthony Peña
Vice President of Policy and Communications
National Association of Wheat Growers

Farm Foundation®
Accelerating people & ideas

St. Louis Region's World Class Logistics Hub Infrastructure & Global Competitiveness

Mary Lamie, P.E.

Executive Vice President – Multi Modal Enterprises, Bi-State Development

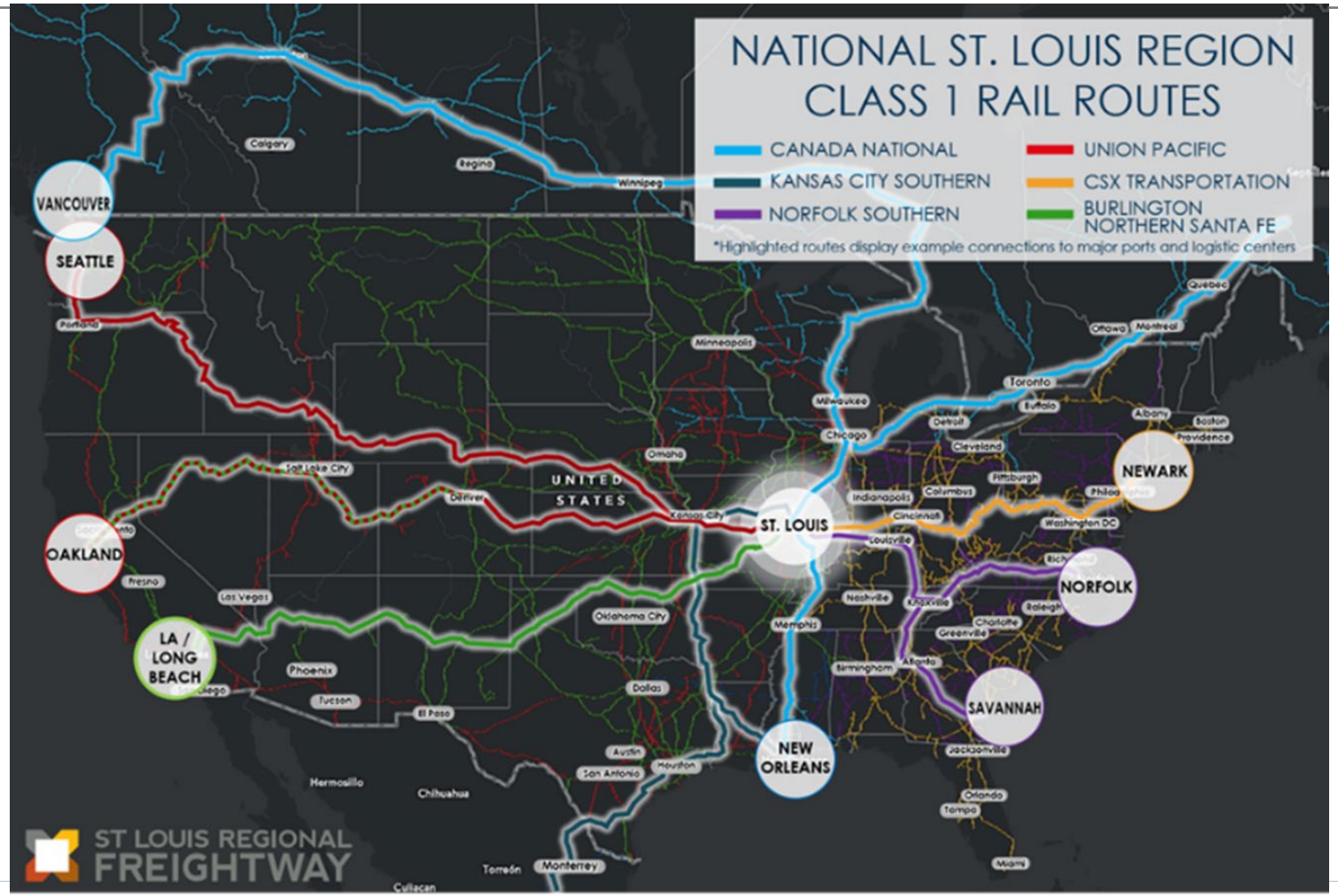
St. Louis Region's Inland Water Competitive Advantages

St. Louis Region – Epicenter of the Midwest!

Why the STL region? This graphic answers the question.

St. Louis Region's Rail Competitive Advantages

Class 1 Rail Routes



St. Louis Region's Rail Competitive Advantages

Global Reach from America's Heartland

STL Region – Home to The Ag Coast of America & Most Efficient Inland Port

Why is this area called the Ag Coast of America?

- 16 barge transfer facilities within a 15-mile section of the Mississippi handling agricultural and fertilizer products
- Capacity: Over 150 barges in a day - the highest level of barge handling capacity ANYWHERE along the Mississippi River.

STL Region Remains Home to the Nation's Most Efficient Inland Port

- #1 Ports of Cincinnati-Northern KY (225 miles)
- #2 Mid-Ohio Valley Port District (217 miles)
- #3 Huntington-Tristate, KY, OH, WV (199 miles)
- #4 Southern Indiana District Port (356 miles)
- #5 St. Louis Metro Port, IL and MO (70 miles)

The STL region plays an important role during supply chain disruptions.

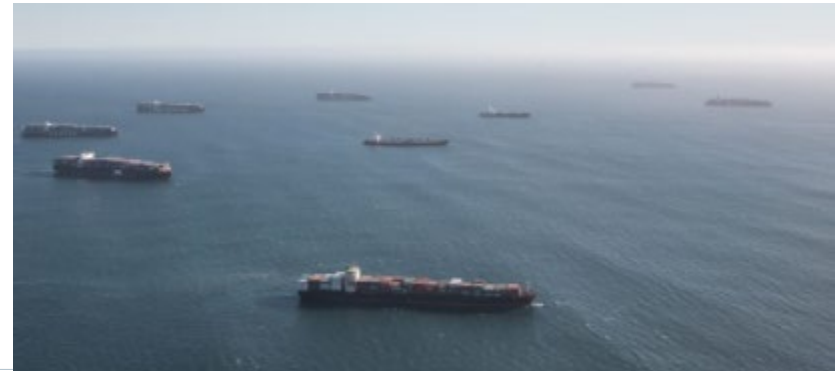
Capacity and reliability to support national and global supply chain disruptions.

- **Severe weather**
- **Fluctuations in energy and transportation costs**
- **Shifts in global government regulations or trade**
- **Global pandemics**

This is the answer to maintaining global competitiveness for the nation's supply chain.

Question: What are we doing to continue to support these efforts?

Answer: Infrastructure investment and innovation



World Class Logistics Hub Infrastructure & Global Competitiveness

This is global commerce!

TheFreightway.com

Streamlining the Site Selection for Multimodal Shippers

Rail-Served Sites Updates

Added 4 New Sites!

Brings total to 20 locations with 26 sites!

Site Selection & Location Strategy

Site selection definition: Measuring the needs of a new project against the merits of potential locations. Compare markets based on the following.

Site Selection Criteria:

- Supply chain flexibility in industrial market (Ranked #1 and #2)
- Accessibility – Companies want to be in the middle of the action and connected to major markets, transportation routes and resources.
- Transportation Costs (Efficient and reliability) (Ranked #1,#2,#3)
- Labor, Labor, Labor (Ranked #1 and #2)
- Overall tax burden, incentives and exemptions (Ranked #2 and #3)
- Utility costs and infrastructure (#4 and #5)
- Real Estate Costs
- Quality of Life – (#2,#3,#4)
- Available Land (Ranked #4)

Challenges and Solutions

Challenge:

- Reliable navigation on the Mississippi River isn't just about freight rates and exports, it's about our nation's competitiveness and resiliency.

- Building the future maritime workforce

Solution:

- Collaboration between industry and government partners to leverage the importance of infrastructure investment and investment in workforce development programs.

TheFreightway.com and mclamie@TheFreightway.com

Thank you!

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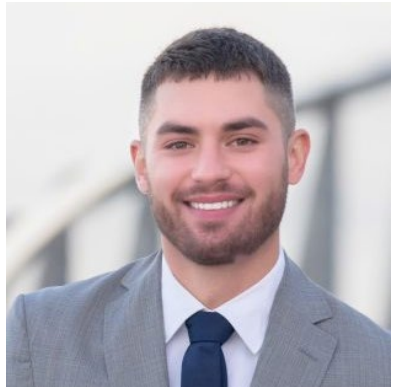

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Columbia–Snake River System

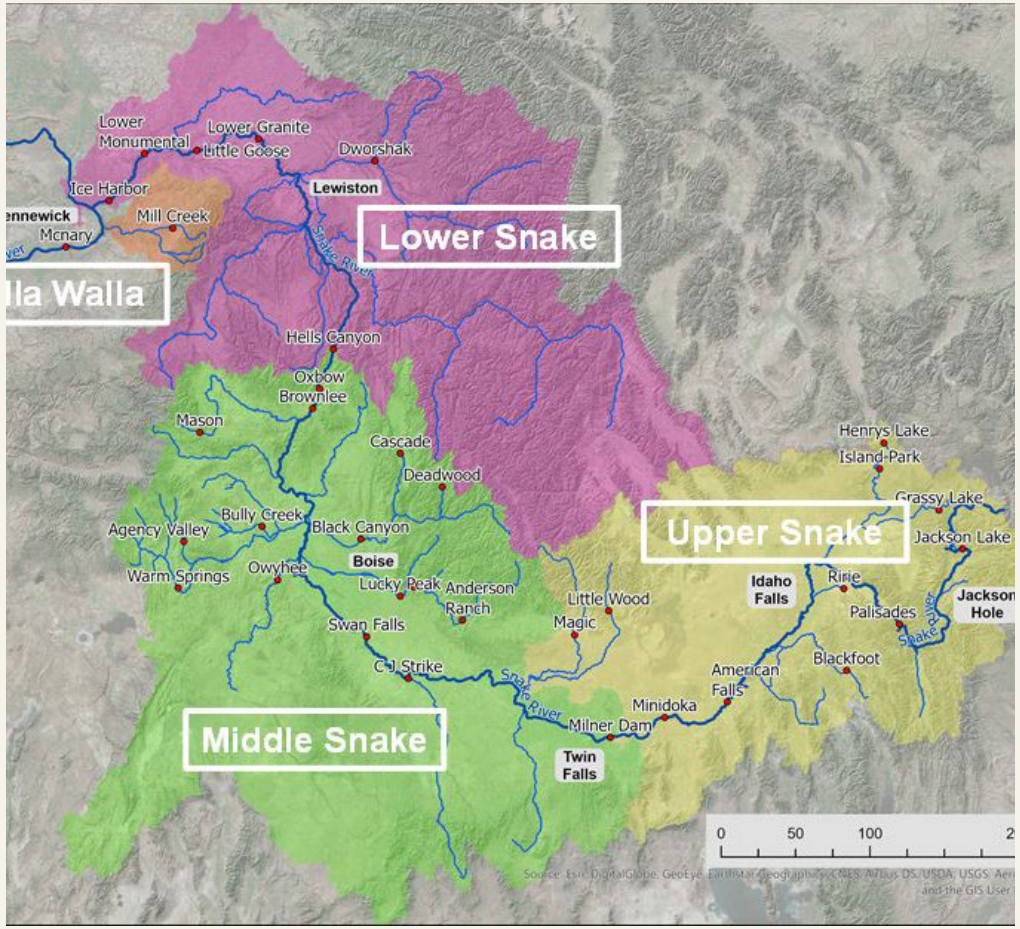
A high-level overview for Farm Foundation

Barge traffic • Columbia River Treaty • Lower Snake River Dams

Presented by Anthony Pena
Vice President of Policy and Communications
National Association of Wheat Growers

Prepared for discussion

The river system is a working corridor



The Columbia–Snake River System links inland wheat country to deep-water export terminals, creating a multimodal corridor that combines barge, rail, truck, port, hydropower, irrigation, flood control, and fish passage infrastructure.

Why agriculture cares

For many inland producers, the river is not “extra” capacity — it is part of the baseline logistics system that keeps grain moving during harvest windows and export programs.

Why policymakers care

Navigation decisions interact with hydropower, salmon recovery, tribal treaty rights, flood risk management, Canadian coordination, and regional energy reliability.

Inland elevators → river terminals → Lower Columbia ports → global buyers

Sources: U.S. Army Corps of Engineers basin map; PNWA Columbia-Snake River System facts; USDA AMS Barge Dashboard.

A national wheat export gateway

10.2M tons

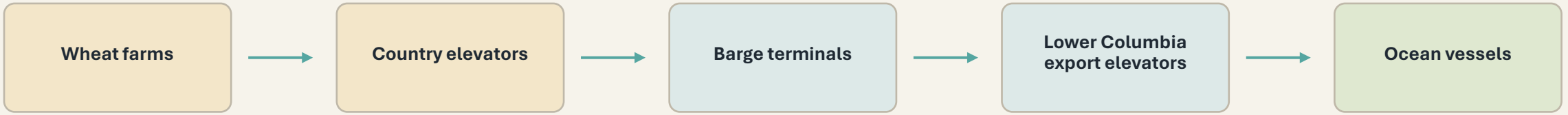
wheat transported through the Columbia–Snake River System in 2023

56%+

of U.S. wheat exports moved through the corridor in 2023

10%

of all U.S. wheat exports move by barge on the Snake River each year



The river matters because grain logistics are time-sensitive, margin-sensitive, and export-oriented. Lower-cost barge movement helps keep U.S. wheat competitive in price-sensitive global markets.

Sources: PNWA 2025 Columbia River facts; USDA AMS Barge Dashboard; U.S. Wheat Associates, Wheat Letter, Mar. 2022.

Barging gives the system surge capacity and cost discipline

Efficiency advantage

A single tow can move hundreds of truckloads of grain equivalent, reducing highway wear, fuel use, and congestion while improving export elevator throughput.

Resilience value

Barge, rail, and truck capacity reinforce one another. Losing one mode shifts volume to the others, creating price and capacity pressure at exactly the wrong time: harvest and export windows.

Market signal

When river operations are uncertain, that uncertainty can show up as basis pressure, higher freight costs, and weaker competitiveness for inland growers.

Sources: USDA AMS Barge Dashboard; PNWA Columbia River commodities/facts; CHS image and regional logistics context.

Two current policy areas shape the future of the corridor

1. Columbia River Treaty

U.S.–Canada framework for flood-risk management and hydropower coordination. Modernization negotiations reached an Agreement in Principle in 2024, but final terms and implementation remain a key uncertainty.

Shared system outcomes

Navigation reliability, flood protection, power costs, water timing, fish operations, tribal/Indigenous interests, and long-term regional investment decisions.

2. Lower Snake River Dams

Four federal dams and locks enable navigation to Lewiston, Idaho, while generating hydropower and supporting irrigation/recreation. They are also central to salmon recovery litigation and dam-breaching debates.

Both issues require balancing multiple public goods — not choosing agriculture in isolation.

Sources: Department of State; USACE; AP; Reuters; PNWA.

Issue 1: Columbia River Treaty modernization

1964 Treaty foundation

The original treaty coordinated U.S.–Canada operations for flood control and hydropower benefits, supported by Canadian storage that affects downstream U.S. flows.

Modernization drivers

- Flood-risk management after 2024
- Canadian operational flexibility
- Hydropower and transmission coordination
- Ecosystem health and Indigenous values
- Compensation and governance

Status to watch

The U.S. and Canada announced an Agreement in Principle in July 2024. British Columbia later reported in March 2025 that the U.S. paused negotiations while reviewing international engagements.

Key question: Will modernization preserve predictable operations while incorporating ecosystem and Indigenous priorities?

Sources: U.S. Department of State, July 2024; USACE Columbia River Treaty; Government of British Columbia, Mar. 2025; Reuters.

Treaty outcomes can affect agriculture even without changing a lock

Flood risk & reliability

Downstream flood protection supports ports, rail, highways, river terminals, communities, and farms along the corridor.

Water timing

Storage and flow coordination influence seasonal operations, reservoir levels, power generation, and conditions for fish migration.

Energy costs

Hydropower coordination affects regional power reliability and costs, including energy-intensive ag processing and irrigation pumping.

Long-term certainty

Export facilities, cooperatives, and producers need predictable rules to make capital investments and logistics plans.

Agriculture's treaty message: preserve reliable, coordinated river operations while modernizing for current realities — climate, fish, tribal/Indigenous interests, and regional power needs.

Sources: Department of State treaty modernization details; USACE; Government of British Columbia.

Issue 2: Lower Snake River Dams are a core navigation link

Four federal dams and locks on the lower Snake River

Ice Harbor → Lower Monumental → Little Goose → Lower Granite

What they provide

Navigation to Lewiston, hydropower generation, irrigation support, recreation, and a long-standing inland transportation option for grain and other commodities.

Why they are contested

The dams are central to salmon and steelhead recovery debates, tribal treaty-right concerns, and litigation over Columbia/Snake River operations.

Status snapshot

The 2023 Resilient Columbia Basin Agreement was later withdrawn by the Trump administration; litigation has resumed, with recent court-ordered operational changes focused on salmon.

Sources: USACE; AP reporting on Resilient Columbia Basin Agreement withdrawal and 2026 dam operations ruling; PNWA.

Dam policy affects freight capacity, not just river miles

Potential consequences if barge access is reduced or removed

Mode shift

Wheat and other commodities move to rail and truck. That requires capacity, scheduling, capital investment, and coordination across a large geography.

Cost shift

Higher freight costs can widen basis and reduce farmgate returns, especially for inland producers far from export terminals.

Infrastructure shift

Roads, bridges, rail sidings, storage, elevators, and port capacity would need to absorb the volume and harvest timing now handled by barges.

Balanced policy challenge

Advance durable salmon recovery and honor tribal commitments while ensuring any transportation, power, irrigation, and community impacts are fully understood, funded, and operational before major system changes occur.

Sources: PNWA; USDA AMS; AP; High Country News; WSU analysis of Columbia-Snake navigation and U.S. agriculture.

Farm Foundation discussion frame: system reliability + credible transition planning

Questions to carry forward

Reliability	What level of river, rail, truck, port, and power reliability is required to keep inland agriculture competitive?
Governance	How should treaty modernization and domestic dam operations be coordinated so decisions are not made in silos?
Transition proof	If operations change, what replacement capacity must be built, funded, and proven before growers are asked to absorb the risk?
Durability	What package can withstand litigation, administration changes, and stakeholder distrust?

Bottom line: the Columbia–Snake River System is not just a river — it is critical national export, energy, flood-risk, and ecosystem infrastructure.

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Question and Answer

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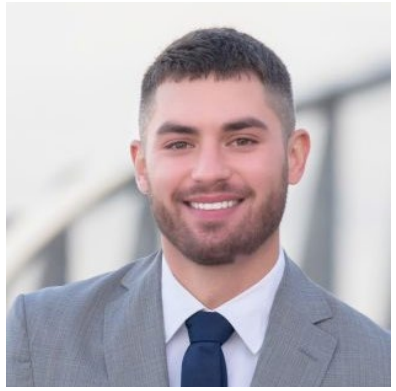

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