

Maritime Information System

Quarterly newsletter

NO. 10, SEPTEMBER 2018

This Maritime Information System (MIS) newsletter presents a summary of the tonnages handled in the five CPAs located in Québec for the current year's first eight (8) months (January-August) and briefly outlines the change in tonnages handled by the domestic and international fleets over the past five years.

We would like to remind you that the MIS has a web interface (www.statsmaritimes.com) on which you can find past newsletters and a great deal of marine sector-related statistical data. Users can configure their dashboard according to their interests and conduct customized databank queries. The website is updated regularly and enriched to make it THE reference for data on the marine sector. We welcome your suggestions for improving the site's format and content.

Happy reading!

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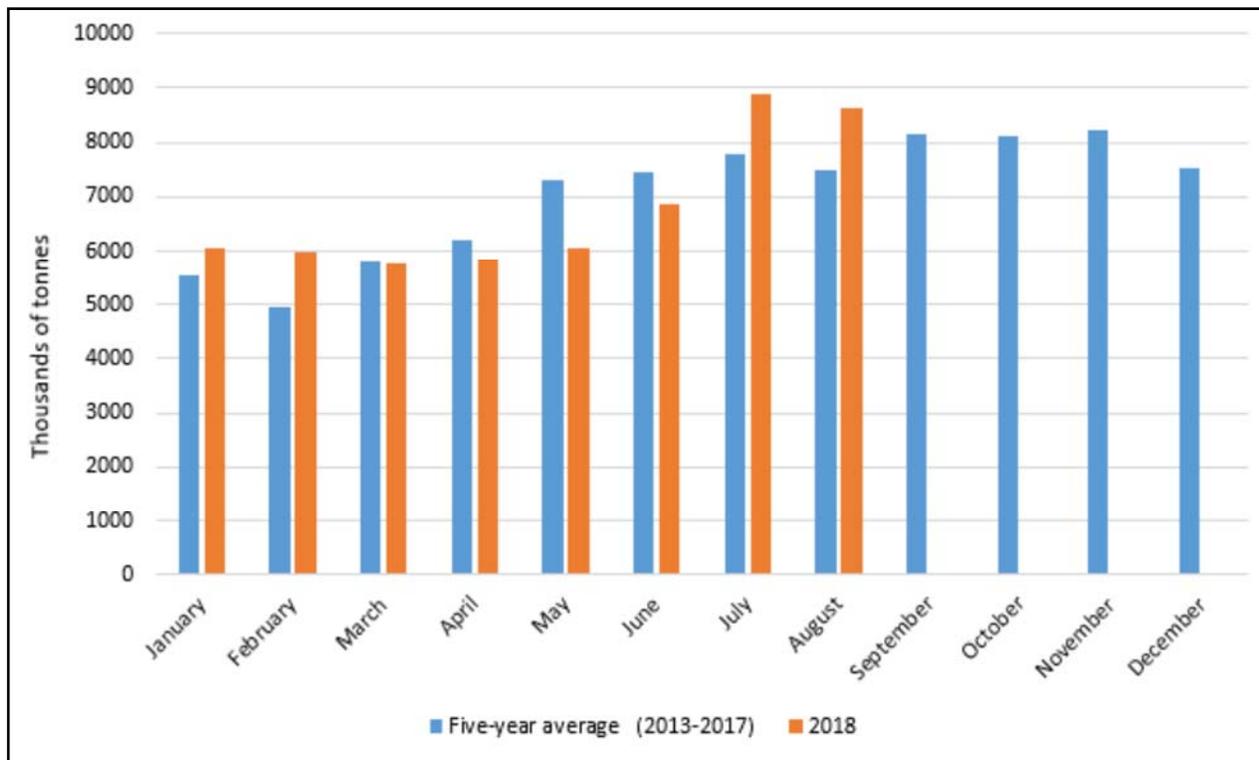
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MONITORING MARINE ACTIVITY

The status report for the first eight months of 2018 shows a slight upturn in cargo volumes handled in the five CPAs located in Québec. Increases in January and February were 8% and 21% respectively from the past five years' average. After a few months of decline, the tonnages handled once again posted a significant rise as of July compared to the five-year reference period (2013-2017). The cumulated 54 097 098 tonnes handled in the first eight months of 2018 were up 3% from the 2013-2017 average (52 542 699 tonnes). In the first eight months of 2017 alone, these five CPAs handled 56 800 470 tonnes, a volume that was slightly higher than the current year's.

Figure 1– Monthly tonnages handled in the 5 CPAs located in Québec¹



Sources : CPAs, IMAR

With 9 533 480 tonnes handled in the first eight months of 2018, containerized cargo posted a slight increase of 11% from the five-year average (8 577 272 tonnes for the first eight months of 2013-2017) and was up 4% from the results for 2017 (9 170 178 tonnes). Accounting for 38% of the tonnage handled in these five CPAs in the first eight months of 2018, with 20 549 332 tonnes, liquid bulk posted a 23% increase from the 2013-2017 average (16 697 860 tonnes). This positive result represents a 4% upturn from January-August 2017 (19 705 943 tonnes).

¹ Five CPAs located in Québec: Montréal, Québec City, Trois-Rivières, Saguenay, Sept-Îles.

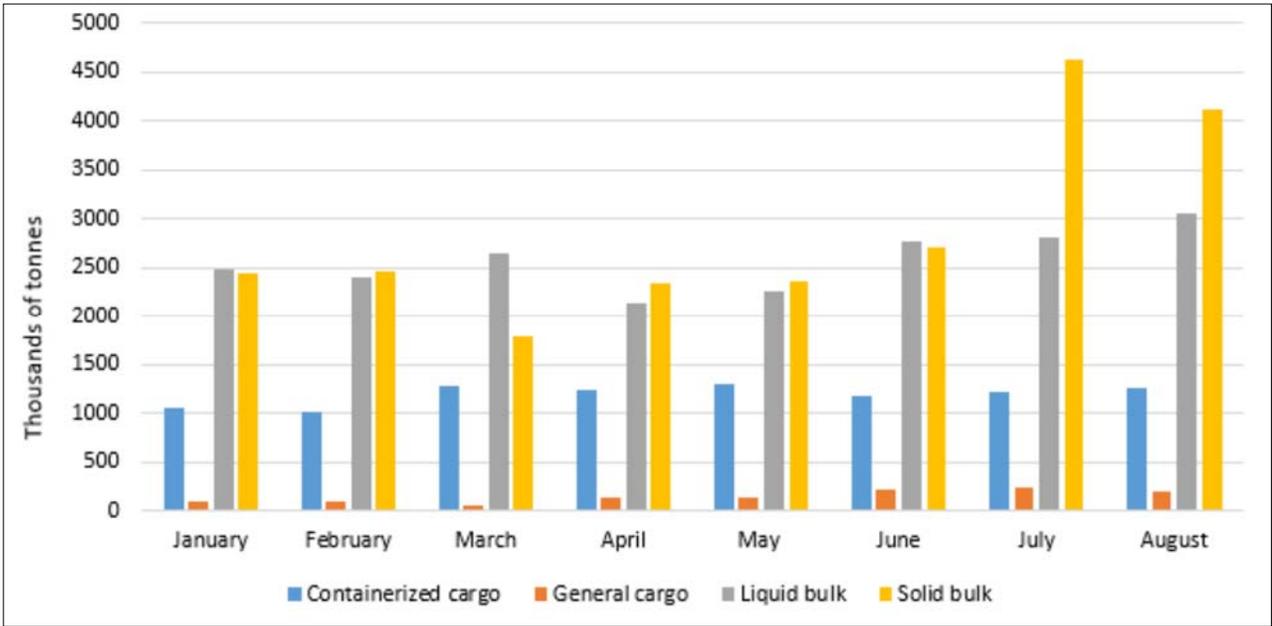




Solid bulk’s performance was more sluggish than last year (same date). With a cumulated 22 844 920 tonnes for the first eight months of 2018, this cargo class represented 42% of the total tonnage handled in these 5 CPAs over this period. However, it fell short of the five-year average (25 610 942 tonnes) and the 2017 result for January-August (26 890 999 tonnes). In 2018, solid bulk posted an 11% downturn from the 2013-2017 average (15% compared to 2017) due to a slowdown in grain shipments and transshipment of other solid bulk cargo.

On the international side, Australia, the main iron ore producer in 2017 trimmed its shipping forecasts for 2018² from 874 to 860 million tonnes.

Figure 2– Breakdown of total tonnage by cargo class for the 5 CPAs located in Québec (January-August 2018)



Sources : CPAs, IMAR

General cargo represented barely 2% of the total transshipped in these five CPAs in the first eight months of 2018. However, comparatively, the tonnage handled in 2018 is 13% higher than that for 2017: the first eight months of 2018 posted a cumulated 1 169 365 tonnes compared to 1 033 351 tonnes for 2017. The five-year average for the period January-August is 1 656 626 tonnes.

² <https://www.spglobal.com/platts/en/market-insights/latest-news/metals/070218-australia-trims-2018-iron-ore-export-price-forecasts>



OVERVIEW OF CARGO HANDLED BY INTERNATIONAL AND DOMESTIC FLEETS IN THE FIVE CPAS LOCATED IN QUÉBEC (2013-2017)

Cargo handling activities in the five CPAs located in Québec derive from international fleets (imports, exports) and the domestic fleet (Canadian-flagged, only fleet authorized for coastal trade). Analysis of the cargo³ handled by the CPAs, between 2013 and 2017, shows a historic, generally stable breakdown between fleets, with the exception of liquid bulk.

While the international fleet transports the lion's share of containerized cargo (97% on average) and solid bulk⁴ (80% on average), the breakdown is more equal for general cargo (58% on average for the international fleet vs. 42% for the domestic fleet). We can also see a significant change in the breakdown of liquid bulk tonnage handled by both fleets, with the domestic fleet moving from 19% in 2015 to 48% in 2017. This change corresponds to the establishment of a new liquid bulk transport service between the ports of Montréal and Québec City.

Figure 3- Proportions of tonnage handled (5 CPAs located in Québec, 2013-2017) by the domestic and international fleets

	2013	2014	2015	2016	2017
Containerized cargo					
International fleet	98%	97%	97%	97%	97%
Domestic Fleet	2%	3%	3%	3%	3%
General cargo					
International fleet	59%	62%	51%	60%	56%
Domestic Fleet	41%	38%	49%	40%	44%
Liquid bulk					
International fleet	84%	82%	81%	56%	52%
Domestic Fleet	16%	18%	19%	44%	48%
Solid bulk					
International fleet	79%	81%	81%	83%	80%
Domestic Fleet	21%	19%	19%	17%	20%

Sources : CPAs, IMAR

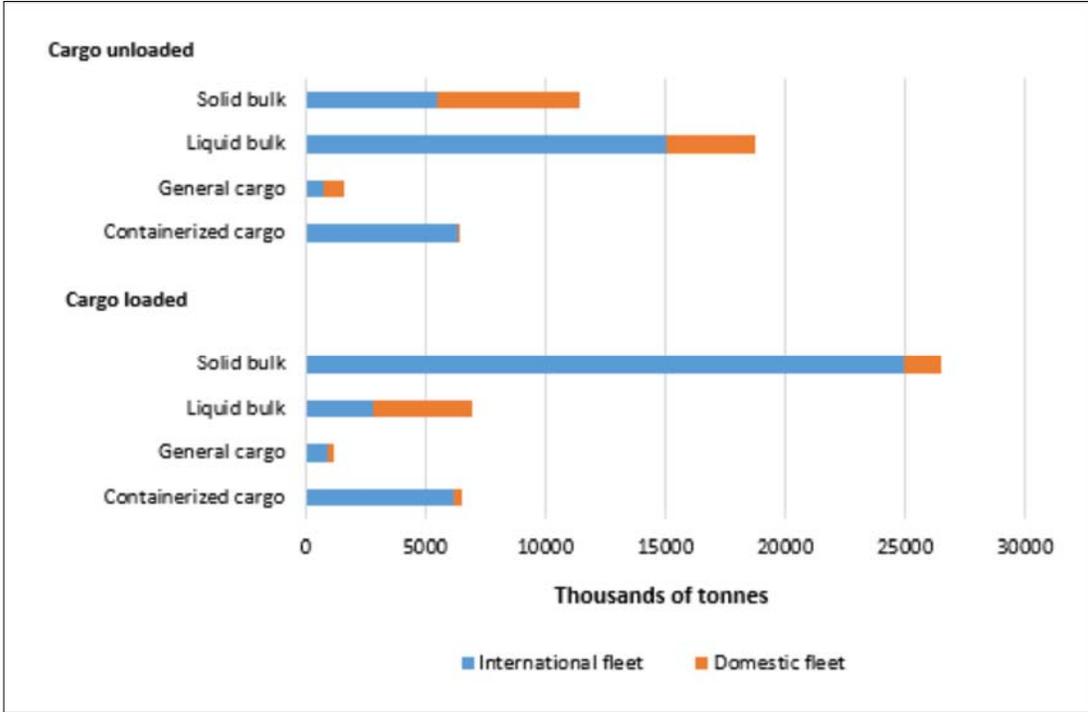
Liquid bulk represents close to half of the tonnage unloaded annually in the five CPAs located in Québec (18 724 456 tonnes out of 38 080 755 tonnes on average in 2013-2017). The breakdown between the international fleet (80% of the five-year average, with 15 011 002 tonnes) and the domestic fleet (20%, with 3 713 454 tonnes) for liquid bulk unloaded, shows that transport from outside Canada to the CPAs located in Québec was predominant. The liquid bulk loading situation was very different: the five-year average indicates 4 177 461 tonnes loaded on the domestic fleet (60%) vs. 2 804 527 tonnes for the international fleet (40%), thereby confirming the impact of the hydrocarbon transport service running between Montréal and Québec City as of 2016 (Figure 5).

³ Grain is excluded from this analysis since the data for this solid bulk were incomplete.

⁴ Excluding grain.

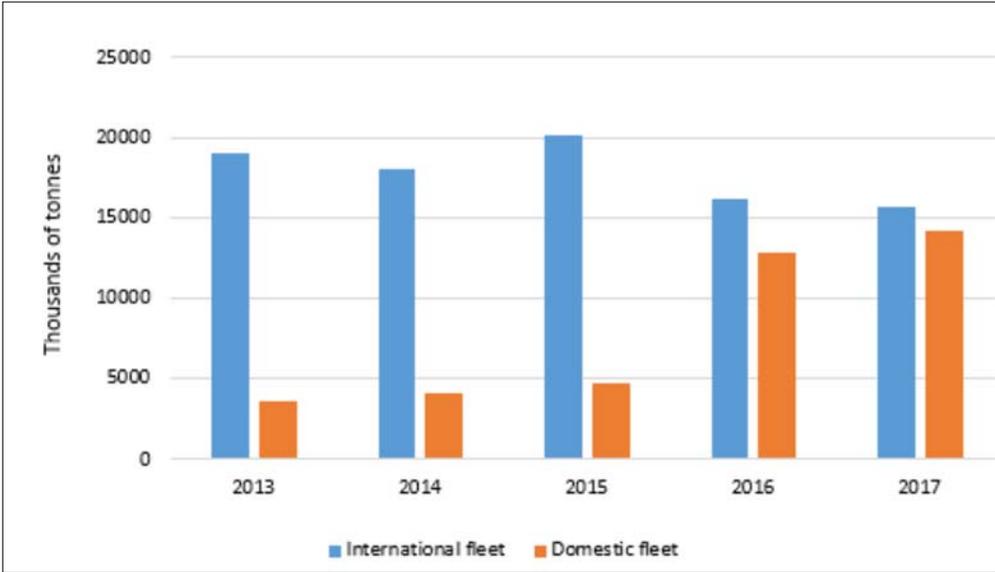


Figure 4- Relative share (international and domestic fleets) of cargo transhipped in the five CPAs located in Québec (average, 2013-2017)



Sources : CPAs, IMAR

Figure 5- Change in liquid bulk volumes handled in the five CPAs located in Québec (2013-2017)



Sources : CPAs, IMAR





For cargo loaded, solid bulk⁵ represents 64% of all cargo shipped⁶ from the five CPAs located in Québec, with an average of 26 463 883 tonnes over the past five years. This is primarily an export market since the international fleet transports 94% of this cargo (close to 25 million tonnes), leaving 1 525 198 tonnes to the domestic fleet (4%). Like liquid bulk, solid bulk is posting a different trend: solid bulk unloaded in the CPAs located in Québec shows more balanced proportions between the two fleets, with 5 507 242 tonnes loaded onto ships flying foreign colours and 5 908 302 tonnes loaded onto Canadian-flagged vessels (on average, for the past five years).

While they represent only a very small portion of containerized tonnage, the data for tonnages loaded and unloaded onto Canadian-flagged container ships show cargo movement primarily from Montréal to Newfoundland (on average 327 056 tonnes in 2013-2017). Containers from Newfoundland unloaded correspond to 31 068 tonnes (average, 2013-2017).

Container transport is carried out essentially by the international fleet. Over five years (2013-2017), we can see that annual tonnages loaded/unloaded are virtually the same, that is, 6 200 320 tonnes and 6 323 262 tonnes respectively. These figures reflect the fact that the Port of Montréal is a so-called destination port for container ship operators.

⁵ Excluding grain.

⁶ On average, 41 119 486 tonnes between 2013 and 2018.

