

Maritime Information System

Quarterly newsletter

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This Maritime Information System (MIS) newsletter features a summary of marine activity on the St. Lawrence and Saguenay rivers for 2018 and provides information on tanker traffic on the St. Lawrence and Great Lakes in 2018.

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. Those interested can subscribe online to one of the two MIS subscription plans available. Subscribers enjoy access to all databases and can conduct customized queries. All partners associated with the MIS project are currently working on preparing Phase 2, which should make it possible to enrich the web platform implemented in 2017 for the marine industry still further.

Happy reading!

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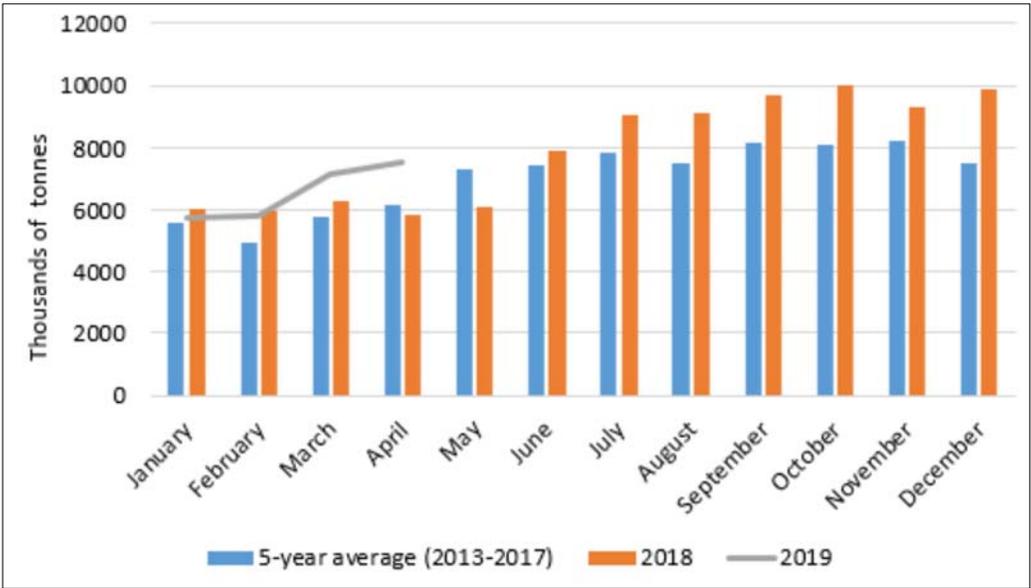


MONITORING MARINE ACTIVITY

The year 2018 posted a positive performance in terms of total tonnage handled in the 5 CPAs located in Québec: 95 192 103 tonnes, up 13% from the average for the preceding five years (84 591 222 tonnes). Compared to the 2017 season (91 068 751 tonnes), tonnage handled was up 4% in 2018.

The first four months of 2019 also showed interesting growth, with a total of 26 297 668 tonnes, up more than 2 million tonnes (+ 9%) from the first four months of 2018.

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



Sources : CPAs, IMAR

With a total of 13 890 117 tonnes handled, containerized cargo finished 2018 up 12% from the average for the past five years and up 5% from 2017 (13 187 747 tonnes). Containerized cargo represented 15% of the tonnage handled by the 5 CPAs located in Québec in 2018.

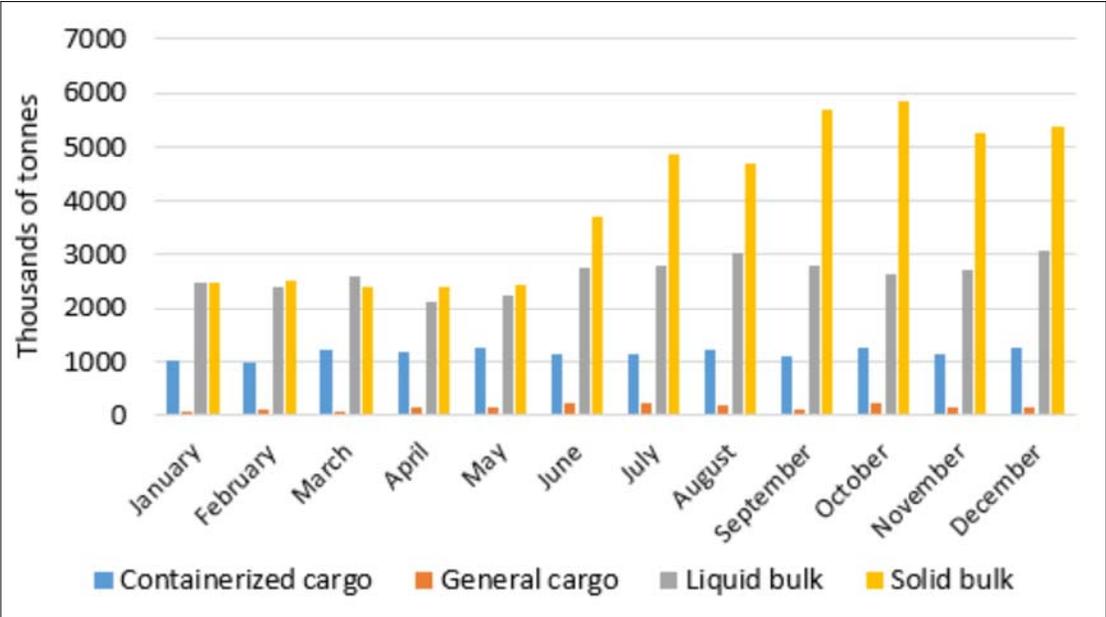
Solid bulk represented 50% of the tonnage handled in 2018. Totalling 47 661 113 tonnes, this cargo class posted a 10% increase from the 2013-2017 average (43 503 010 tonnes) and exceeded the 2017 total (46 235 279 tonnes) by 3%. Liquid bulk accounted for one-third of all tonnage handled in the Québec CPAs in 2018 (33%), totalling 31 819 602 tonnes. This total was up 23% from the average for the preceding five years (25 774 851 tonnes) and exceeded the 2017 total (30 076 796 tonnes) by 6%.

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





Figure 2– Breakdown of total tonnage by cargo class for the 5 CPAs located in Québec , 2018



Sources: CPAs, IMAR

In 2018, general cargo represented 2% of the tonnage handled in the 5 CPAs located in Québec. Posting a total of 1 821 271 tonnes handled, this cargo type finished the year with a 16% increase from 2017 (1 568 928 tonnes). This positive performance does not, however, exceed the overall average for 2013-2017 (2 927 005 tonnes).

For the first four months of 2019, the various cargo types all posted a more positive performance than for the same period in 2018. The greatest variation, in terms of tonnage handled, occurred in solid bulk, with 1 067 147 tonnes more than in 2018 (up 11%). Containerized cargo posted an increase of 540 557 tonnes (12%), while liquid bulk handled in the early months of 2019 was up 4% (397 091 tonnes more than the same period in 2018). General cargo showed an upswing in tonnage handled (96 771 tonnes more from January to April 2019), up 25% from the tonnage handled in the first four months of 2018 (383 638 tonnes in 2018 vs. 480 409 tonnes in 2019).



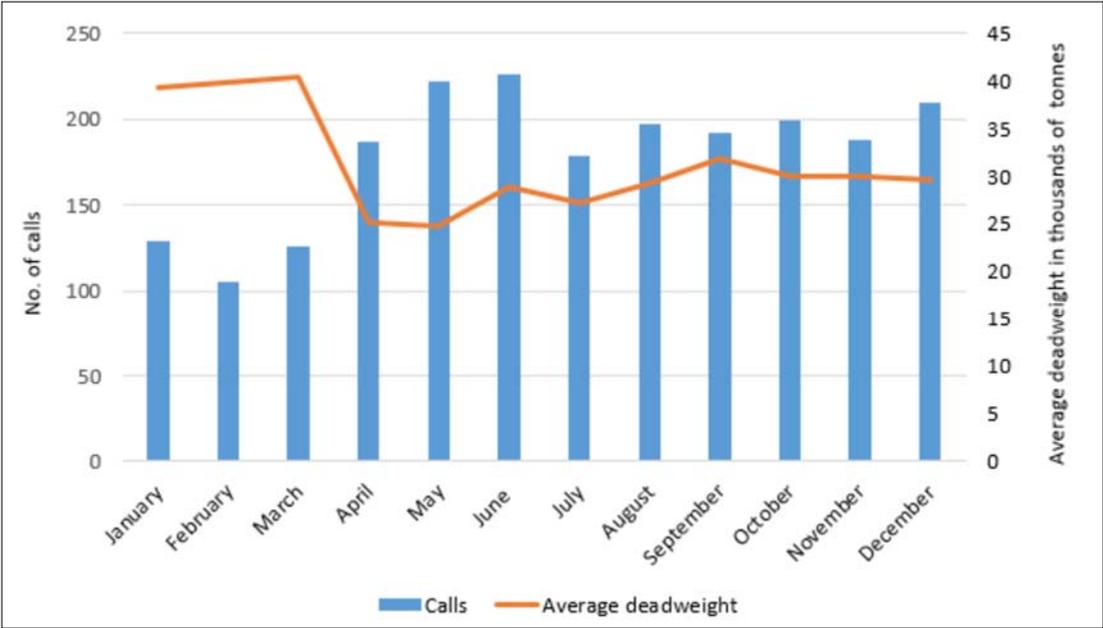


OVERVIEW OF TANKER TRAFFIC ON THE ST. LAWRENCE AND GREAT LAKES IN 2018

In 2018, tankers posted 2 160 calls in Canadian ports located on the Great Lakes and St. Lawrence.

The monthly breakdown of calls is linked to the St. Lawrence Seaway shipping season. In 2018, the season ran from March 29 to December 20, which explains the lower number of calls in January, February and March. Although vessel traffic at this time is more limited on both the Great Lakes and St. Lawrence, the relative proportion of big ships positively influenced the average deadweight of tankers that were active in the study area. When Seaway activities started up again in the spring, and with the return of smaller tankers operating between the St. Lawrence River and Great Lakes, average tanker deadweight decreased to 25-30 thousand tonnes (Figure 3).

Figure 3– Change in the number of calls and deadweight of tankers that called in Canadian ports in Québec and the Great Lakes in 2018



Sources: INNAV, IMAR

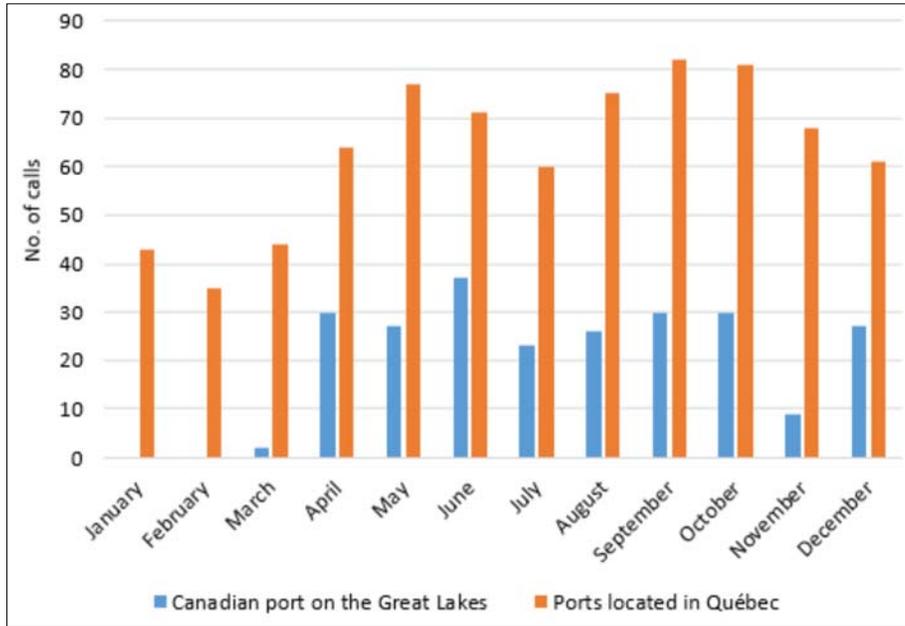
Tanker calls in Canadian ports are made by both the domestic fleet and the international fleet. For transits to ports on the Great Lakes as well as ports located on the St. Lawrence, liquid bulk transportation involves both of these fleets. However, their operating pattern differs significantly.

The international tanker fleet is not present in the Great Lakes region on an ongoing basis due to the seasonal closure of the St. Lawrence Seaway. However, as soon as the Seaway opens, the international fleet begins to post calls (2 in March 2018) in Canadian Great Lakes ports. Monthly records show a fluctuation in tanker calls in Québec ports year-round, with a significant slowdown in the first three months (Figure 4).



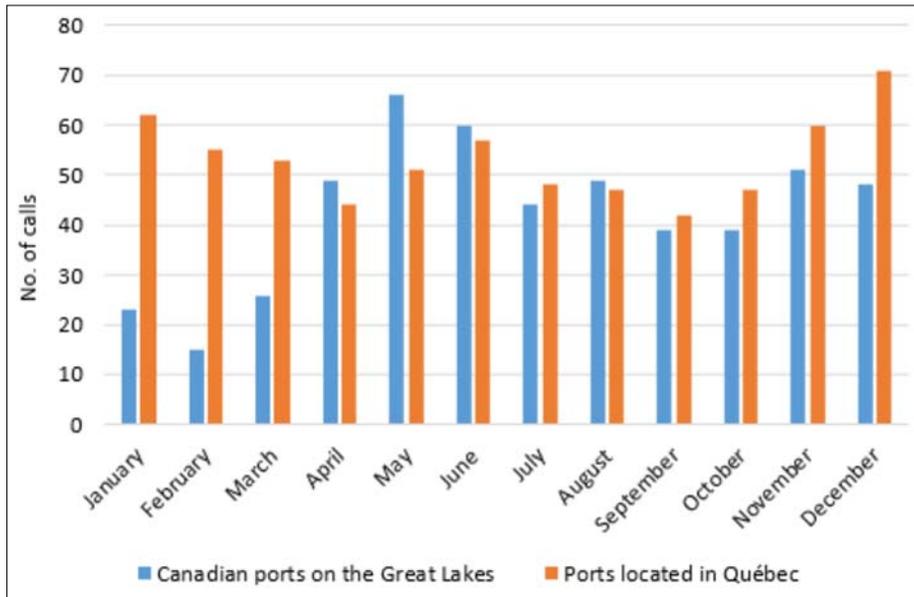


Figure 4– Monthly change in foreign tanker calls in Canadian ports located in Québec and on the Great Lakes (2018)



Sources: INNAV, IMAR

Figure 5– Monthly change in domestic tanker calls in Canadian ports located in Québec and on the Great Lakes (2018)



Sources: INNAV, IMAR





The domestic fleet is active year-round both in Québec and on the Great Lakes (Figure 5). Although the St. Lawrence Seaway ceases its activities in the winter, shipping remains possible between certain Great Lakes ports and we see Canadian tankers in these waters all winter long. As soon as Seaway operations begin again, the domestic fleet’s activities show an upturn in calls in Great Lakes ports. In the 2018 season, domestic tankers made 509 calls in Canadian Great Lakes ports and 637 calls in Québec ports.

The overall tanker fleet that made at least one call in a Canadian Great Lakes or Québec port in 2018 (all flags) represented a total of 313 ships—93% foreign-flagged (290 different vessels) vs. 7% (23 vessels) Canadian-flagged.

Of the 290 foreign ships, 67 (23% of the fleet) were sized to be able to enter the Seaway. Unlike foreign tankers, almost all (19 out of 23) tankers belonging to the domestic fleet can use the St. Lawrence (maximum vessel size: 225.55 m long and 23.77 m wide).

Despite its relatively small numbers within the overall fleet, the domestic tanker fleet is the most active in Canadian Great Lakes and Québec ports. With 53% of calls, in 2018, it posted an average of almost 50 calls per ship compared to 3.4 calls for the international fleet.

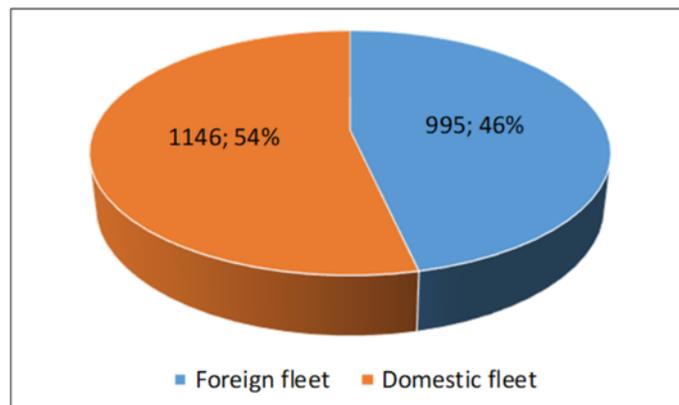
Coasting Trade Act and foreign tankers

The data show that a good many foreign tankers are active on the St. Lawrence and Great Lakes. Although the great majority of their transits originate in ports located outside Canada, we also observe transits between two Canadian ports. Vessel voyages can be explained by one of the following scenarios:

- The ship is repositioning: After having unloaded its cargo in a first port, the ship is travelling to another Canadian port to load its next cargo.
- Loading or unloading at multiple calls: For example, the ship berths in a first Canadian port to unload part of its cargo, then travels to a second Canadian port to complete the delivery. The process is similar for loading: embarking part of the load at point A and finalizing at point B.
- The ship carries the cargo from one Canadian port of departure to another Canadian port.

The latter constitutes a coasting trade operation. Under the Act governing this type of activity, foreign ships are not authorized to load and unload goods between two Canadian ports. However, the *Coasting Trade Act* provides for certain exceptions subject to obtaining a licence from the Canadian Transportation Agency. Licences can cover an event (e.g. a specific transit) or a period of time. In 2018, the Agency recommended 25 licences for operators navigating the Great Lakes and St. Lawrence (compared to 15 in 2017).

Figure 6– Number of tanker calls in Canadian Great Lakes and Québec ports (2018)



Sources: CPAs, IMAR





Some characteristics of the tankers operating on the St. Lawrence and Great Lakes

Since they are more specialized, tankers belonging to the Canadian fleet differ from those of the international fleet. Compared to the international fleet, a larger proportion of domestic vessels are adapted to navigating the St. Lawrence Seaway locks. Smaller and fewer, Canadian vessels are also older, on average, than the international fleet’s ships.

Assigned primarily to ocean-going voyages, the international fleet’s tankers present on the St. Lawrence in 2018 count on several large-capacity units that generally include the Port of Québec. In 2018, 30 of the 290 foreign-flagged tankers indicated a deadweight over 100 000 tonnes.

Chart 1– Comparative data for the domestic and international tanker fleets (2018, with calls in a Québec or Great Lakes port)

Element	Canadian-flagged	Foreign-flagged
Average age	14 years	9 years
Oldest	ESTA DESGAGNÉS (1992)	MARILINE (1996)
Most recent	PAUL A. DESGAGNÉS (2018)	HELLAS CALAFIA (2018)
Average deadweight	24 856 tonnes	36 816 tonnes
Minimum deadweight	STERLING ENERGY (1 231 tonnes)	IVER BRIGHT (6 265 tonnes)
Maximum deadweight	LAURENTIA DESGAGNÉS (74 940 tonnes)	CAP THEODORA (159 400 tonnes)



PAUL A. DESGAGNÉS



HELLAS CALAFIA



