

# Marine outlook

Highlights of the marine industry

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## PORTS

### Sept-Îles

#### Port extension project

By the end of September 2003, the tonnage handled at the Port of Sept-Îles totalled around 15,3 Mt, down 1 % from last year's corresponding period. 400 ships called the port between January and August 2003, compared with 382 in 2002.<sup>1</sup>

A recent study concluded to the possibility of having a container transshipment terminal in the bay of Sept-Îles, where cargo would be transferred from large ocean-going vessels to smaller lakers that would then proceed up the Seaway. Some 600,000 containers would have to be handled for the project to be financially viable, which is half the annual number of containers handled at the Port of Montreal.<sup>2</sup>

As for the port extension project, a group of twenty elected representatives and business people presented a business plan to Industry Minister Mr. Allan Rock. With Alouette phase II completed in 2005, port authorities feel it is urgent to start this 13 M\$ project. The Port cannot meet all these costs alone and the government was asked to help.<sup>3</sup>

### Montreal

#### Tonnage increases

The total traffic handled at the Port of Montreal during the first half of 2003 reached 9,5 Mt, up nearly 10 % from the same period of last year. The port's competing services and the strength of the Canadian economy boosted container traffic during the first half of 2003. The port handled 4,8 Mt of containerized commodities, which is roughly 6 % higher than last year. This performance suggests that the port is on its way to another record year for container traffic.<sup>4</sup>

In July, the largest container ship ever to sail the Saint-Lawrence arrived at Montreal. Specially designed for the River, the OOCL *Montréal* has a draught of 10,7 metres, equal to that of the 2 300 TEU container ships calling Montreal that are already in service. The ship measures 294 metres in length, 32,2 in breadth, has a gross registered tonnage of 55 994 t and a nominal capacity of 4 100 TEU containers.<sup>5</sup>

### Port-Cartier

#### Tonnage up

At the end of June 2003, the tonnage handled at the Port of Port-Cartier totalled around 7 Mt, a 5 % increase from the first half of 2002. Between January and August 2003, 140 ships came to Port-Cartier, compared with 132 for the same period of last year.<sup>6</sup>

<sup>1</sup> Sept-Îles Port Authorities.

<sup>2</sup> « Une étude favorable à un terminal maritime de transbordement des conteneurs à Sept-Îles », [Radio-Canada WEB site](#), 10 July 2003.

<sup>3</sup> « Le plan d'agrandissement du port de Sept-Îles déposé au ministre Allan Rock », [Radio-Canada WEB site](#), 13 August 2003.

<sup>4</sup> « Port of Montreal traffic increases in all cargo sectors except grain », Press release, [Port of Montreal](#), 24 July 2003.

<sup>5</sup> « Brand-new, largest containership ever to sail the Saint-Lawrence arrives at the Port of Montreal », Press release, [Port of Montreal](#), 11 July 2003.

<sup>6</sup> Port-Cartier Port Authorities.

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### Quebec

#### Posted tonnage is up

By August 31, 2003 the tonnage handled at the Port of Quebec totalled 11,8 Mt, or 4 % higher than for the first eight months of 2002. 635 vessels called the Port between January and August 2003, 238 ocean-going and 397 coasters.<sup>7</sup>

### Sorel

#### Slight rise of ilmenite tonnage

By August 31, 2003 the tonnage handled at the Port of Sorel reached 2,7 Mt up 1 % from the same period of last year. The rise is attributed to a low increase of ilmenite tonnage from Havre-Saint-Pierre. At the end of August 2003, 144 vessels called the port, compared with 156 by the end of August 2002.<sup>8</sup>

### Baie-Comeau

#### Grain and cereal tonnage increases

At the end of August 2003, the tonnage handled at the Port of Baie-Comeau totalled approximately 2,4 Mt, or 10 % more than at the end of August 2002. Wheat and cereal tonnage increased due to better crops in Western Canada during this summer compared to last year's. The port hosted 146 ships between January and August 2003, compared with 138 last year.<sup>9</sup>

To that tonnage, an additional 469 000 t of commodities were carried between Baie-Comeau and Matane by the *Georges-Alexandre-Lebel*, which represents an increase of 9 % attributed to an increase in aluminium tonnage. Between January and August 2003, the ferry-rail made 288 round trips, 23 more than for the same period of last year.<sup>10</sup>

The Société du port ferroviaire de Baie-Comeau – Hauterive (SOPOR) has plans to build a second transshipment centre in the new 165-hectare regional industrial park that would be served by a 6,3 km railway. Project costs would be around 14 M\$. So far, the Quebec Government has promised 6,7 M\$ and SOPOR is hoping for a federal grant of 2,5 M\$.<sup>11</sup>

### Port-Alfred

#### Tonnage increases

By August 31, 2003 the total tonnage handled at the Port of Port-Alfred reached 3 Mt, up 4 % from the same period of last year. Tonnage of alumina, green coke, fluorite and fuel oil was higher than the decrease in bauxite, caustic soda and calcined coke. Between January and August 2003, 84 ships called the port, down 2 from last year.<sup>12</sup>

### Trois-Rivières

#### New liquid bulk transshipment centre

By June 30, 2003 there were 875 000 t of commodities handled at the port, a drop of 23 % compared with the first half of 2002. Lower cereal transshipments and the loss of a major client of the petroleum sector explain these lower figures. While 230 000 t of grains and cereals were handled during the first half of 2002, only 75 000 t were transhipped during the first half of 2003. Wheat transshipments at the beginning of 2003 were down because of the western Canada drought of 2002.<sup>13</sup>

A new liquid bulk transshipment and storage centre will be built at the Port of Trois-Rivières. The tanks, which cost 3,5 M\$, will hold liquid clay used in the production of fine papers by Kruger. With these new installations, the Port of Trois-Rivières will be able to handle an additional 100 000 t, which correspond to around ten ship transits per year.<sup>14</sup>

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<sup>7</sup> Quebec Port Authorities.

<sup>8</sup> « Detailed report of tonnage handled by Quebec harbours and ports », [Transport Canada](#), September 2003.

<sup>9</sup> Ibid

<sup>10</sup> « Tonnage carried by ferry-rail *Georges-Alexandre-Lebel* », [SOPOR & COGEMA](#), January to May 2002 & 2003.

<sup>11</sup> Duhamel, Alain, « Le traversier-rail est devenu essentiel à plusieurs industries », [Les Affaires](#), 12 July 2003.

<sup>12</sup> Port-Alfred Port Authorities.

<sup>13</sup> « Le port de Trois-Rivières enregistre une baisse du tonnage manutentionné », [La Presse Canadienne](#), 22 July 2003; « Une baisse de 23 % pour le premier semestre par rapport à l'an dernier », [Le Nouvelliste](#), 22 July 2003.

<sup>14</sup> « Construction d'un nouveau terminal de vrac liquide au port de Trois-Rivières », [Groupe TVA WEB site](#), 25 July 2003; « Important investissement au port de Trois-Rivières », [Radio-Canada WEB site](#), 25 July 2003.

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### Bécancour

#### *Giant cranes in jeopardy*

As of August 31, 2003 the tonnage handled at the Port of Bécancour totalled 1,1 Mt, down 5 % from the same period of last year. This drop is attributed in part to lower tonnage of alumina and magnesite. However, coke and steel rods were up. At the end of August, 66 ships called the port, three less than for the same period of last year.<sup>15</sup>

The giant cranes project is in jeopardy after the announcement of the budget by the new Quebec liberal government. The previous PQ government had promised a 5 M\$ subsidy for the procurement of two giant cranes for transshipping cargoes.<sup>16</sup>

### Matane

#### *Higher tonnage*

By the end of August 2003, the tonnage handled at Matane reached around 140 000 t, up 9 % from last year's corresponding period, mostly due to higher gas and petroleum products tonnage. An additional 469 000 t were also carried by the ferry-rail *Georges-Alexandre-Lebel* (see Baie-Comeau). Twenty-eight (28) ships called the port during the first eight months of the year, unchanged from last August.<sup>17</sup>

### Port-Saguenay

#### *Port-Saguenay innovates, exports granite*

By August 31, 2003 the tonnage handled at Port-Saguenay added up to around 294 000 t, up 5 %. Tonnage dropped in several categories during the first eight months of 2003 : woodpulp, newsprint and de-icing salt. However, the first ship carrying 40 000 t of crushed granite left Port-Saguenay for Florida in July ; this is the main reason why tonnage rose during the first eight months, although other goods were down. Port-Saguenay hosted 41 ships during the period, compared with 47 last year.<sup>18</sup>

Port-Saguenay was licensed by the provincial government to operate, in Grande-Anse, a 70 Mt crushed granite pit. Port Authorities believe that annual sales of crushed granite could reach between 300 000 and 500 000 t within three years, mainly on the U.S. market.<sup>19</sup>

### Havre-Saint-Pierre

#### *Tonnage rising slightly*

By May 31, 2003 the tonnage handled at Havre-Saint-Pierre totalled 1,4 Mt, slightly more than for the same period of last year. This is explained by a little more ilmenite being shipped to QIT-Fer et Titane of Sorel-Tracy.<sup>20</sup>

### Rimouski

#### *Tonnage down*

By August 31, 2003 the tonnage handled at the Port of Rimouski totalled 164 000 t, down 13 % from last year's total for the same period, mostly due to fewer landings of gas and oil products. Consequently, 47 ships came in compared with 52 in 2002.<sup>21</sup>

### Pointe-au-Pic

#### *Newsprint tonnage drops*

By August 31, 2003 the tonnage handled at Pointe-au-Pic reached 132 000 t, which is 2 % less than last year. This is explained by a lower newsprint tonnage. There were 25 ships calling the port for the first eight months, one less than last year.<sup>22</sup>

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<sup>15</sup> Administration portuaire de Bécancour.

<sup>16</sup> « Pas d'argent pour les grues du port de Bécancour », *Le Nouvelliste*, 24 July 2003.

<sup>17</sup> « Detailed report on tonnage handled by Quebec harbours and ports », *Transport Canada*, September 2003.

<sup>18</sup> Port-Saguenay Port authorities.

<sup>19</sup> « Port-Saguenay innove avec l'exploitation de granite pour l'exportation », *Radio-Canada WEB site*, 4 July 2003.

<sup>20</sup> « Detailed report on tonnage handled by Quebec harbours and ports », *Transport Canada*, September 2003.

<sup>21</sup> Ibid

<sup>22</sup> Ibid

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### Gaspé

#### Significant drop in tonnage

By August 31, 2003 the tonnage handled at the Port of Gaspé reached around 62 000 t, a significant drop from last year's total of 222 000 t. This is due to the closing of the Murdochville smelter in 2001. The main commodities handled were salt, gas and other petroleum products. 19 ships sailed in between January and August 2003, compared with 34 for the same period of last year.<sup>23</sup>

### Gros-Cacouna

#### Gaz Métro has liquefied gas project for Gros-Cacouna

During the first eight months of this year, the tonnage handled at Gros-Cacouna totalled 140 000 t, a 53 % increase over last year explained by a higher tonnage of softwood lumber and newsprint. By the end of August, 35 ships called the port compared with 22 for the same date last year.<sup>24</sup>

Gaz Métro's liquefied gas project could bring in more business for the port. Large infrastructures would be required to accommodate liquefied natural gas tankers. 200 M\$ project is under study but remains preliminary.<sup>25</sup> (see *Commodities section - Natural gas*, p.6)

### Portneuf

#### Tonnage down

As of August 31, 2003 the total tonnage handled at the Port of Portneuf reached 49 000 t, down 40 % from 2002. This drop is attributed to lower coal shipments, slightly lower than last year's 3 300 t. Seven ships called the port, one more than last year.<sup>26</sup>

### Chandler

#### Salt tonnage low

By august 31, 2003, the Port of Chandler handled 3 700 tonnes, a little higher than last year's 3 300 t.<sup>27</sup> The port handles salt almost exclusively since the closing of Gaspésia.

### Cap-aux-Meules

#### New harbour station

Federal MP for Bonaventure-Gaspé-Îles-de-la-Madelienne-Pabok, Mr. Georges Farrah, has announced a 1,6 M\$ grant on behalf of Transport Canada for the construction of a new harbour station at the Cap-aux-Meules ferry dock. The Port of Cap-aux-Meules is owned by Transport Canada and is listed as a remote harbour according to the National Marine Policy. It is the main crossroads of Îles-de-la-Madeleine for the transport of passengers and commodities. The actual harbour station is located at the ferry dock and is used by the new ferry *NM Madeleine* for its trips to and from Souris, P.E.I.<sup>28</sup>

SEAWAY

#### Transits/cargo down

During the first seven months of 2003, 1 627 vessels sailed the SLSW, 5 % less than for the same period of last year. Cargoes have also dropped, as vessels carried 17 Mt this year, compared with 18 Mt in 2003. Cereals suffered the largest decrease with 30 % less than last year.<sup>29</sup>

#### 2002-2003 annual report<sup>30</sup>

The SLSW Management Corporation (SLSMC) issued its 2002-2003 annual report last July. The document present the annual statement. Goods carried in the Montreal/Lake Ontario section in 2002 totalled 30 Mt, down 0,9 % from 2001. On Welland canal, a little over 32,1 Mt of commodities were carried. This represents a slight 1 % drop. Combined Seaway traffic reached 41,4 Mt, slightly less than 2001's 41,7 Mt.

<sup>23</sup> « Detailed report on tonnage handled by Quebec harbours and ports », [Transport Canada](#), September 2003.

<sup>24</sup> Ibid

<sup>25</sup> Larouche, Marc, « Gaz Métro a l'œil sur Gros-Cacouna », [Le Soleil](#), 29 September 2003.

<sup>26</sup> « Detailed report on tonnage handled by Quebec harbours and ports », [Transports Canada](#), September 2003.

<sup>27</sup> Ibid

<sup>28</sup> « New Harbour Station for Cap-aux-Meules », Press release, [Transport Canada](#), 22 September 2003.

<sup>29</sup> « Seaway monthly report, 31 July 2003 », [Great Lakes/SLSW WEB site](#).

<sup>30</sup> « 2002-2003 annual report », [SLSW Management Corporation](#), June 2003; « Seaway 2002-2003 report highlights new business plan », Press release, [SLSW Management Corporation](#), July 2003.

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The new 2003-2007 business plan that took effect April 1<sup>st</sup> calls for annual toll increases, starting in 2003, that will be capped at 2 % for the remaining 4 years of the plan.

### **Increased surveillance of seabeds**

The Canadian Navy has launched a new surveillance program of commercial navigation waterways and North-American ports that could be targeted and mined by terrorists. The program will also draw a list of natural and other objects presently in our waterways, which will later allow identification of new objects and conduct inquiries as to their nature.<sup>31</sup>

## COMMODITIES

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### **Iron ore**

#### ***Rising iron ore shipments from Quebec***

Quebec's iron ore shipments totalled around 5,8 Mt for the first half of 2003, an increase of 14 % over the same period of last year<sup>32</sup>, but steel demand in North-America, largely dependent on the economy, remains low. Steel prices dropped significantly since the beginning of the year.<sup>33</sup> However, the demand for iron pellets and concentrate from other countries such as Asia is very good.<sup>34</sup>

### **Wheat**

#### ***AAC expects crops lower than ten-year average***

Agriculture and Agri-food Canada (AAC) recently announced that the next wheat crop will yield less than expected. « Total wheat production is estimated at 17,2 Mt, up 44 % from the 2002-2003 *crop year*, but will be well under the 19,9 Mt ten-year average. Exports should increase from 6,2 Mt in 2002-2003 to 10,4 Mt in 2003-2004, but will remain below the 13,5 Mt ten-year average ». <sup>35</sup>

### **Aluminium**

#### ***Canada increases production of aluminium***

Statistics on the production of aluminium in Canada for the first half of 2003 indicate a production of 1,41 Mt, an increase of 3,5 % from the same period of last year.<sup>36</sup> Export and Development Canada (EDC) experts believe industry will do very good in 2003 because the North-American automobile sector is stable and commercial demand is rising.<sup>37</sup>

The mega-transaction between Pechiney and Alcan was also announced in September. Pechiney accepted the 6,5 G\$ offer from Alcan. Now approved by Le Conseil des marchés financiers français, the European Commission and the U.S. Department of Justice, the deal will make Alcan as big as U.S. owned Alcoa.<sup>38</sup>

### **Softwood lumber and newsprint**

#### ***Softwood industry still suffering...***

U.S. sanctions continue their devastating effects on Quebec's softwood exports, which have dropped 22 % in a single year. It appears that the situation will not improve in 2003. Several sawmills will shutdown temporarily or end their operations for good and Quebec's softwood production will most likely suffer a significant drop.<sup>39</sup>

#### ***...so is the pulp and paper industry***

The softwood dispute, the slow recovery of the U.S. economy, strong competition, increasing energy costs, lower demand for newsprint, reduced cut areas and overcapacity are the main factors affecting the pulp and paper sector in Quebec.<sup>40</sup>

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<sup>31</sup> Chamberland, Martin, « Terrorisme : Surveillance accrue des voies maritimes », [La Presse](#), 30 June 2003.

<sup>32</sup> « Production of main minerals in Canada », [Natural Resources Canada](#), June 2003.

<sup>33</sup> Tison, Marie, « Atlas Steel pourrait fermer à Sorel-Tracy », [Le Soleil](#), 10 September 2003.

<sup>34</sup> Tremblay, Stéphane, « Québec Cartier déménage pour économiser », [Le Soleil](#), 2 August 2003.

<sup>35</sup> « Canada : Cereals and Oilseeds Prospects! », [Agriculture and Agri-food Canada](#), 17 September 2003.

<sup>36</sup> « Production of main minerals in Canada », [Natural Resources Canada](#), June 2003.

<sup>37</sup> « Exports estimates », [Exports and Development Canada](#), Spring 2003.

<sup>38</sup> Pouliot, François, « Alcan veut gober Pechiney », [Le Soleil](#), 8 July 2003; « Alcan a le feu vert », [Radio-Canada WEB site](#), 30 September 2003.

<sup>39</sup> Riverin, François, « Le secteur du bois d'œuvre devra patienter », [Les Affaires 500-édition 2003](#).

<sup>40</sup> Riverin, François, « Rien n'est jamais acquis pour les papetières », [Les Affaires 500-édition 2003](#); Pouliot, François, « Papier et forêt : qui est en danger? », [Les Affaires](#), 23 August 2003.

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### Natural gas

#### **Gaz Métro could build natural gas terminal**<sup>41</sup>

Demand for natural gas is increasing rapidly in North-America since the 90s where a good number of power stations fired by natural gas were built. Stocks are very low and prices have almost tripled during the last three years.

For these reasons, carriers and distributors now think of importing liquefied gas from producing countries like Algeria, Indonesia, United Arab Emirates and Qatar. However, from the time being Canada does not have the port infrastructures required to accommodate liquefied gas tankers. TransCanada, a gas distributor is currently making a survey of potential sites for building a terminal in Canada and also in the U.S.

Gaz Métro distributes 97 % of the natural gas used in Quebec. It is also studying the possibility of building that type of terminal in the province. Company spokesperson says potential sites for such are situated between Lévis and Rivière-du-Loup. The port selected has to be deep-water. The Port of Gros-Cacouna appears to have GM's preference. This project is very costly: the company would have to build the infrastructures required to process on the spot, liquefied gas back to its gaseous state and also build a pipeline over a distance of 200 km to connect Cacouna to Quebec's gas distribution network, which now ends in Lévis.<sup>42</sup> (see *Ports section – Gros-Cacouna, p.4*)

### FERRIES

#### **Activity slackens**<sup>43</sup>

From April 1<sup>st</sup> to July 31<sup>st</sup> 2003, close to 2,2 million passengers and 861 440 vehicles were carried by Société des Traversiers du Québec (STQ) ferries, down 4 % from the same period of last year for passengers and 1 % for vehicles.

The most severe drop in passenger traffic was observed at the Île-aux-Grues/Montmagny ferry with 14 %, followed by Québec/Lévis at 11 %. Rank is reversed for vehicle traffic with drops of 18 % for Québec/Lévis and 9 % for Île-aux-Grues/Montmagny.

Let's recall that the summer of 2002 was a record season for the Québec/Lévis ferry because of repairs to the Pierre-Laporte bridge. This year's traffic drop is therefore less significant than they appear, when compared with figures before 2002. At Île-aux-Grues/Montmagny, the effect of adverse weather conditions combined with tides early in the summer reduced the number of crossings and consequently of passengers and vehicles.

#### **N.M. Lomer-Gouin refit**

The ferry *N.M. Lomer-Gouin*, (Québec/Lévis) is presently undergoing various repairs and should be back in service by mid-March 2004 ; meanwhile, it is replaced by the *N.M. Radisson*.<sup>44</sup>

#### **Connection Grande-Vallée - Anticosti - Havre-Saint-Pierre**

The project for a ferry service between Grande-Vallée, Anticosti and Havre-Saint-Pierre is not abandoned. Quebec's Minister of Regional Development and Tourism, Mrs. Nathalie Normandeau, also responsible for the Gaspésie/Îles-de-la-Madeleine region, and the Minister responsible for the North-Shore region, Mr. Claude Béchar, confirmed that the government will support the project.<sup>45</sup> However, the Quebec is asking the federal government, owner of the Havre-Saint-Pierre facilities, to get involved. Financing will have to be reviewed since Ottawa was not part of the project originally ; the Quebec liberals hope it will be completed by next spring.<sup>46</sup>

#### **Aussies interested by CNM Évolution**

An Australian company has made an offer to buy the catamaran *CNM Évolution* (Forestville-Rimouski). If the deal is done, STQ could go ahead with the project of a new catamaran, as part of its strategic plan ; the 60-vehicle and 300-passenger ship would operate, under private management, between Rimouski, Baie-Comeau and Matane. The ferryship *Camille-Marcoux* would continue its activities.<sup>47</sup>

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<sup>41</sup> Normand, François, « Le prix élevé du gaz naturel accélère l'exploration au Québec », *Les Affaires*, 14 June 2003.

<sup>42</sup> Larouche, Marc, « Gaz Métro a l'œil sur Gros-Cacouna », *Le Soleil*, 29 September 2003.

<sup>43</sup> « Statistiques pour la période se terminant le 31 juillet 2003 », *Société des traversiers du Québec*, September 2003.

<sup>44</sup> « Traverse Québec-Lévis – Le traversier N.M. Lomer-Gouin quitte Québec pour des travaux de modernisation à l'Île-aux-Coudres », communiqué de presse, *Société des traversiers du Québec*, 8 September 2003.

<sup>45</sup> « Lien interrives Grande-Vallée-Anticosti-Havre-Saint-Pierre - Le Gouvernement du Québec confirme son intérêt pour le projet », communiqué de presse, *Cabinet de la Ministre déléguée au développement régional et au tourisme, responsable de la région Gaspésie-Îles-de-la-Madeleine*, 22 August 2003.

<sup>46</sup> « Normandeau confirme l'intérêt de son gouvernement pour un lien maritime entre la Gaspésie, la Côte-Nord et Anticosti », *Radio-Canada Web site*, 26 August 2003.

<sup>47</sup> Thériault, Carl, « Traversier CNM Évolution » - Offre d'achat australienne », *Le Soleil*, 15 September 2003.

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### CRUISES - TOURS

#### **Current trends in cruises and tours**<sup>48</sup>

According to the Quebec cruises and tours integrated development and promotional plan issued last May by the UQAM Chair of Tourism, several trends will influence the cruises and tours market :

- cruises and tours that will make people discover urban, architectural, industrial and historic heritage;
- cruises for children and teens;
- circuits including a cruise or tour combined with other means of transport, i.e. train and cruise;
- increasing popularity of cruises including hotel accommodation (nights);
- desire to live new or particular experiences (fishing, kayaking, « health » cruises, etc.);
- increasing tourists interest for cold water cruises to new destinations such as Alaska, Northern Europe and Antarctica.

The Chair of Tourism says traffic could very well increase to 3 million passengers in Quebec during the next three years. Within five years, the number of passengers is expected to increase by 20-25 % with an efficient promotion plan and proper integration of cruises and tours in the various river-packages offered.

#### **Tour of the Saint-Lawrence Islands**

Croisières Le Coudrier now offers daily tours to Île d'Orléans, Grosse-Île and Îles-aux-Grues ; the company added a new 125-passenger ship to its fleet.<sup>49</sup>

#### **New tour in Charlevoix**

Since the beginning of July, Les Croisières Charlevoix, propose new whale-watching tours leaving from the village of Saint-Siméon, in Charlevoix. The boat is a type « Explorathor » and can accommodate up to 48 passengers. This type of boat is ideal for cruises on the Saint-Lawrence because it is stable, fast and equipped with wraparound windows. The two-hour tour follows the Charlevoix shore-line, bay of Port-au-Saumon up to the Cap de la Tête au Chien lighthouse. There are four departures daily.<sup>50</sup>

#### **Fewer foreign visitors**<sup>51</sup>

Les Dauphins du Saint-Laurent offers tours on the Saint-Lawrence between Quebec and Montreal with calls at Trois-Rivières. Like other tourist businesses, Les Dauphins du Saint-Laurent are struck by a decrease of their clientele this season, as fewer group reservations were made. The three company specializing in whale-watching tours (Association des bateliers du Saguenay, AML and Groupe Dufour) have seen their clientele drop, in some cases by 20 %.

Tourism industry people say there were less international tourists because of bad weather early in the summer and also fewer U.S. visitors due to the lower exchange rate of their dollar reducing their buying power. Americans make up nearly half the passengers cruising on the Saint-Lawrence.

#### **Croisière Transboréale : Cold water cruise project advances**<sup>52</sup>

Croisière Transboréale could get the support of the federal government for its cold water cruises project in Quebec and the Maritimes. Economic Development Canada is now part of the discussions on the project and is trying to find a way to finance it within existing financial assistance programs. Quebec could also take part in the project ; regional development and tourism minister, Mrs. Nathalie Normandeau said that la Société Générale de Financement might want to participate in this 600 M\$ project.

Croisière Transboréale is contemplating the purchase of two 220 M\$ ships which would be built over a two year period beginning in July 2004. The ships' itinerary would be Montreal, Quebec, Baie-Comeau, Corner Brook, Blanc-Sablon, Goose Bay, Lewisports, St-John's, Saint-Pierre-et-Miquelon, Cap-aux-Meules, Pictou Nova Scotia, Gaspé, and back to Quebec and Montreal. Cruise duration is expected to be 12 days over a distance of 5 400 km. Economic spin-offs for these cities are estimated at 50 M\$.

Croisière Transboréale is also looking at the possibility of adding a ship service to villages of the Lower North-Shore. The smaller ship would replace the *Nordik Express* when the contract ends. It would ply between Baie-Comeau, Sept-Îles, Port-Menier on Anticosti, Havre-Saint-Pierre, Natashquan, and other villages between Kegaska and Blanc-Sablon, on a distance of 800 km. Time frames are not available for the moment.

<sup>48</sup> « Plan intégré de développement et de promotion des croisières-excursions du Québec – Rapport final », Chaire de Tourisme de l'UQAM, May 2003; Pelchat, Pierre, « Croisières-excursions sur le Saint-Laurent – Une industrie à l'avenir prometteur », Le Soleil, 3 July 2003.

<sup>49</sup> Thibeault, Clément, « Nouveau navire », Le Soleil, 4 July 2003.

<sup>50</sup> « St-Siméon, capitale des baleines? », Groupe TVA WEB site, 22 July 2003.

<sup>51</sup> « Les Dauphins du Saint-Laurent connaissent une baisse d'achalandage », Cyberpresse.ca, 14 July 2003; « Peu de touristes ont admiré les baleines cet été », Radio-Canada WEB site, 15 August 2003; Duhamel, Alain, « Beaucoup de potentiel pour les croisières-excursions » Journal des affaires, 12 July 2003; « Des moments difficiles pour l'industrie des croisières », Radio-Canada WEB site, 16 July 2003.

<sup>52</sup> Pelchat, Pierre, « Ottawa appuie Croisière Transboréale », Le Soleil, 5 September 2003; Pelchat, Pierre, « Québec pourrait investir dans le projet de 600 millions \$ de Croisière Transboréale », Le Soleil, 3 September 2003.

# Marine outlook

## Highlights of the marine industry

### INTERNATIONAL CRUISES

#### ***Calls at Montreal and Quebec***<sup>53</sup>

By mid-September, international cruise ships made 29 calls in Quebec City and 38 more are scheduled before the season ends. 18 were made in Montreal and 9 more are expected before October 26, 2003.

#### ***Cruise between Montreal, Trois-Rivières and Saint-Pierre-et-Miquelon ?***

Promoters from Mauricie recently met with top managers of Tourisme Québec to present their project. A purchase offer was made for a 400-passenger ship. Promoters hope to get a quick response from the government in order to begin operations next summer.<sup>54</sup>

### WATER LEVEL

#### ***Water level***

Water level at the Port of Montreal last August was 0,06 metres above average. For September, Canadian Hydrographic Service forecasts 0,40 metres above average.<sup>55</sup>

#### ***Water level rises on Saint-Lawrence***

After the huge power failure that hit Ontario and the U.S., the International Joint Commission, which controls the flow rate of trans-border waters, authorized several power plants to increase their flow in order to help networks of northeastern US and Ontario get back into business. That operation added some 230 million cubic metres of water to the regular flow of the Saint-Lawrence.<sup>56</sup>

#### ***Consequences of climate changes***

A study by the International Joint Commission concluded that global warming would lower the average Great Lakes water level by at least 20 centimetres and, maybe, by 1,5 metres by the end of the century as a consequence of the reduction, or even complete disappearance of the winter ice cover. Global warming would also change the water temperature of the Great Lakes, which would endanger some fish species and contribute to the formation of algae. The water level of the Saint-Lawrence would also be affected.<sup>57</sup>

Laval University scientists have discovered in Nunavut a break in the most important ice shelf of the Arctic. Researchers believe this was caused by global warming. On the long term, this ice cap might end up on the high seas and present a hazard to navigation.<sup>58</sup>

### RECREATIONAL BOATING

#### ***Saint-Lawrence Marine Trail***<sup>59</sup>

After the National Quebec Trail, the International Appalachian Trail and the Green Trail, an unprecedented river trail could be inaugurated in Quebec within the next few years : *Le sentier maritime du Québec*. Designed for smaller crafts such as sea kayaks and canoes, it would include access ways, rest areas, camping grounds, accommodation, groceries, restaurants, etc.. Concepts like these already exist elsewhere in North-America, like the impressive 520-kilometre Maine Marine Island Trail.

The planned trail line would stretch out for over 2 400 kilometers, from Lake Ontario to the tip of the Gaspé Peninsula on the south shore, and down to Natashquan on the north shore ; it could be inaugurated as early as 2004. Within the framework of its new Water Policy introduced on November 26<sup>th</sup> 2002, the Department of Environment named the Federation Quebecois du canot et du kayak (FQCK) responsible for supervising the trail planning operations and the whole project should be completed by 2014.

***Marine Outlook is a free quarterly reporting highlights of marine transport activities in Quebec.***

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<sup>53</sup> Port of Montreal and Port of Quebec WEB site : <http://www.port-montreal.com/> et <http://www.portquebec.ca/>

<sup>54</sup> « Québec se penche sur le projet de croisière avec escale à Trois-Rivières », [Radio-Canada WEB site](#), 24 September 2003

<sup>55</sup> Canadian Hydrographic Service WEB site : <http://www.shc.gc.ca/chs/fr/>

<sup>56</sup> Péloquin, Tristan, Breton, Pascale, «Le redémarrage des centrales fait monter l'eau du fleuve », [Le Soleil](#), 18 August 2003.

<sup>57</sup> Côté, Charles, « Le réchauffement de la planète fera baisser le Saint-Laurent », [La Presse](#), 21 September 2003.

<sup>58</sup> « Rupture dans la plate-forme glaciaire de l'Arctique », [Radio-Canada WEB site](#), 23 September 2003.

<sup>59</sup> « Sentier maritime du Saint-Laurent – inauguration prévue en 2004 », [L'Escale nautique](#), Summer 2003; Saint-Jean, Louis, « Sentier maritime, un projet au long cours », [Espaces plein-air, voyages et découvertes](#), WEB site ([www.espaces.qc.ca](http://www.espaces.qc.ca)); « Mise en place d'un sentier maritime pour l'estuaire du Saint-Laurent », [Comité zip du sud de l'estuaire, WEB site](#) ([www.zipsud.org](http://www.zipsud.org)).