

Study overview

The St. Lawrence Economic Development Council (SODES), Ministère des Transports du Québec (MTQ) and partners wanted to measure the economic spinoffs of all of Québec's maritime and port activities, a feat last accomplished about fifteen years ago. The analysis focused on both freight and passenger traffic. This study covers the territory served by the St. Lawrence navigation system and its tributaries in Québec.



Photo : Louis Rhéaume

The SODES is a non-profit organization founded in 1985 and mandated to protect and promote the economic interests of the St. Lawrence maritime community. It represents near hundred of organizations of which the activities are connected in the St. Lawrence.

Definition of industry

The definition of "marine industry" used by SODES and the MTQ includes the entire range of activities of operations (businesses) and organizations involved in the industrial products receiving, expediting and distribution chain and those ensuring passenger transportation in the marine system.

Collection and analysis

The economic spinoffs were calculated using operating expenditures and investments evaluated in 2010 by the operations composing the industry. This information was obtained through a survey of representative sampling of all operations. According to this survey, the industry counted 262 establishments in 2011.

Segmentation of industry operations

Marine transport

- ✦ Ship owners/operators
- ✦ Shipping lines
- ✦ Ferries
- ✦ Cruise ships – Tour boats

Port activities

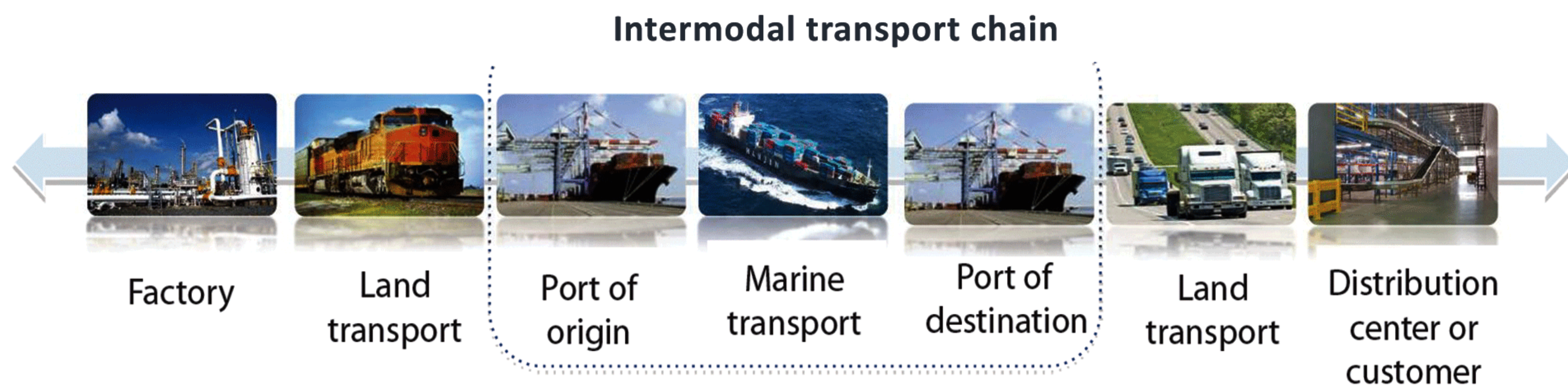
- ✦ Ports
- ✦ Private wharf operators
- ✦ Stevedores and terminals

Support services

- ✦ Government agencies
- ✦ Port service operations
- ✦ Marine service operations
- ✦ Associations

Importance of marine and port activity in Québec

A navigation and port system's scope, or importance, is often described in terms of ship movements, incoming and outgoing tonnage, number of passengers transported, etc. While this study's main goal is to measure the industry's economic contribution, we will, nevertheless, present a few shipping and port-related characteristics.



The industry in numbers

Number of ports (2011)	20
Nombre of ship movements (2009)	10 889
Number of cruise ship passengers (2009)	116 300
Ferry users (2010)	5 613 482
Tonnes of cargo transhipped (2009)	110 000 000

Sources: Statistics Canada. 2011. Shipping in Canada 2009, Tables 11 and 12.
 Société des traversiers du Québec. 2011. Rapport annuel de gestion 2010-2011, page 18.
 Gamache, Clément. 2009. Bulletin économique du transport. June 2009, No. 42.

Economic spinoffs

...of operating expenditures

Total operating expenditures for 2010 were estimated at close to \$3 billion (\$G), one-third of which represented wages. The latter, combined with supplier chain wages and remuneration, supported 27 349 direct, indirect and induced jobs. An industry's economic impact can also be determined by measuring its contribution to the gross domestic product (GDP). The direct, indirect and induced effects of the almost \$3 G in expenditures translates into a \$2.3 G contribution to the GDP at Québec market prices.

Economic impact of the marine transport industry's operating expenditures in Québec in 2010

	Marine transport	Port activities	Support services	Total
Amount spent (\$M)	1 650.8	1 016.2	302.1	2 969.2
Human resources (person-years)	9 163	13 321	4 865	27 349
Value added to market prices (\$M)	853.8	1 101.8	350.4	2 306.0
Imports (\$M)	1 025.0	260.7	79.9	1 365.6
Québec govt. revenues (\$M)	219.8	206.6	74.8	501.3
Federal govt. revenues (\$M)	73.9	78.1	29.1	181.1
Multiplier	1.242	1.284	1.362	-

Source: ISQ and compilation ADEC. The totals do not necessarily equal the sum of the parts since figures have been rounded off.

...of investment expenditures

Each year, the industry also invests significant amounts to restore its assets, replace them or acquire new ones. In 2010, \$459.1 M was earmarked for this purpose.

Economic impact of investment expenditure by the marine transport in Québec in 2010				
	Marine transport	Port activities	Support services	Total
Amount spent (\$M)	85.4	330.8	42.9	459.1
human resources (person-years)	590	2 562	123	3 275
Value added to market prices (\$M)	53.9	224.3	10.7	288.9
Imports (\$M)	45.9	166.8	35.1	247.8
Québec govt. revenues (\$M)	8.3	34.0	1.5	43.7
Federal govt. revenues (\$M)	2.9	12.0	0.5	15.4
Multiplier	1.209	1.212	1.209	-

Source: ISQ and compilation ADEC. The totals do not necessarily equal the sum of the parts since figures have been rounded off.

...of international cruise ships

While economic spinoffs from international cruise ships were not specifically analyzed in the context of this mandate, they were estimated by Tourisme Québec. The results show that cruise ship passengers and crew members spent \$36.6 M in 2010. This amount generated 378 jobs, contributed \$22.5 M to the GDP and brought the Québec government \$5.3 M and the federal government \$2.2 M.

Spinoff distribution by administrative region

One of SODES and the MTQ's objectives was to identify the marine industry's economic contribution by region, as illustrated by the following table.



Photo: Canadian Coast Guard

Regional distribution of jobs and GDP associated with marine industry operating expenditures in 2010

Administrative région	Jobs (person-years)	GDP (\$M)
Montréal	8 915	751.8
Capitale-Nationale	4 102	345.9
Côte-Nord	4 020	339.0
Montréal	2 817	237.5
Bas-Saint-Laurent	2 243	189.1
Gaspésie-Îles-de-la-Madeleine	1 449	122.2
Mauricie	1 121	94.5
Saguenay-Lac-Saint-Jean	629	53.0
Outaouais	328	27.7
Lanaudière	328	27.7
Laurentides	328	27.7
Centre-du-Québec	246	20.8
Chaudière-Appalaches	246	20.8
Laval	219	18.4
Abitibi-Témiscamingue	137	11.5
Nord-du-Québec	137	11.5
Estrie	82	6.9
Total	27 349	2 306,0

Source: ISQ and compilation ADEC. The totals do not necessarily equal the sum of the parts since figures have been rounded off.

Québec marine transport industry highlights

- A network of more than **20 ports and terminals** serving all of Québec
- **Economic spinoffs** for all Québec regions
- **110 million tonnes** of cargo transhipped annually on average
- **262 companies** contributing \$2.3 billion to Québec's GDP
- More than **27,000 jobs** generated on land and at sea
- \$1 billion paid in **wages** in 2010
- \$21 million spend on **human resources training** (2.1% of total payroll)
- \$681 million in **revenues for governments**
- 5.6 million **passengers carried** by ferries
- Investments of \$12.9 million in **environmental technologies**
- **116 300 cruise ship passengers** who spend more than \$36 million during their stopover in Québec



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