CRITICAL ISSUES IN TRANSPORTATION
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Rail Sector – C-49 - Implications for Rail
Dr. Malcolm Cairns, Malcolm Cairns Research & Consulting

Air Sector - Looking Forward
Marc Rioux, Executive Director, Air Policy – International, Transport Canada

Marine Sector – Port Issues
Wendy Zatylny, president, Association of Canadian Port Authorities

Trucking Sector – Groaning with Growth
Lou Smyrlis, managing director, Newcom Trucking & Supply Chain Group
Two thirds of Cdn shippers increased volumes in 2018

Only 7% of Cdn shippers decreased volumes in 2018

Shipment levels in 2018 compared to previous year

Source: Transportation Buying Trends Survey, Newcom Media
Projections for shipment volumes in 2019

- **61%** of Cdn shippers expect to increase freight volumes in 2019
- Only **4%** of Cdn shippers expect to decrease volumes in 2019

*Source: Transportation Buying Trends Survey, Newcom Media*
CRITICAL ISSUES IN TRANSPORTATION

Increasing use of modes in 2019

- Intermodal: 28%
- Air cargo: 14%
- Marine: 37%
- Courier: 22%
- Private Fleet Truck: 17%
- For-Hire Less than Truckload: 35%
- For-Hire Truckload: 41%
- Rail: 27%

Source: Transportation Buying Trends Survey, Newcom Media
Which of the following statements best describe business conditions where you work?

64%  Business is steady, and we’re staying the course.
21%  We’re in growth mode. The business keeps coming.
14%  We’re under pressure and making cuts.
1%   This place is doomed. Are you hiring?

Source: Reader Pulse Survey, Newcom Media
CRITICAL ISSUES IN TRANSPORTATION

Percentage of heavy duty vehicle fleet anticipate replacing by end of year

- More than 30%: 35% of respondents
- 30% of fleet: 13%
- 20% of fleet: 7%
- 10% of fleet: 10%

Percentage of heavy duty vehicle fleet anticipate replacing next year

- More than 30%: 25% of respondents
- 30% of fleet: 27%
- 20% of fleet: 39%
- 10% of fleet: 4%

Source: Equipment Buying Trends Survey, Newcom Media
CRITICAL ISSUES IN TRANSPORTATION

Historical Comparison Class 8 Truck Sales

Source: Equipment Buying Trends Survey, Newcom Media
What are the factors that may prevent growth of your fleet?
(Check all that apply)

46% Lack of drivers
38% Increased regulations
31% Other
13% Lack of available capital
13% Lack of equipment
10% Lack of new customers
 8% Lack of administration/office staff
 5% Lack of dispatchers
 5% We’re at capacity and have nowhere to grow

Source: Reader Pulse Survey, Newcom Media
CRITICAL ISSUES IN TRANSPORTATION

IMMIGRATION

1/3 of Canada’s truck drivers are now immigrants

- Red: Total Drivers
- Black: Immigrant Drivers

Source: Newcom Media and National Household Survey

Source: Reader Pulse Survey, Newcom Media
More than 40% of immigrant drivers are from India

Source: Newcom Media and National Household Survey
CRITICAL ISSUES IN TRANSPORTATION

15% of Canada’s truck drivers speak Punjabi

**Truck driver languages other than English or French**

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There are 4x more Punjabi/Hindi speaking drivers than there are German, Russian & Spanish speaking drivers COMBINED

Half the Punjabi speaking drivers live in ONTARIO

**Truck drivers who speak Punjabi**

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Source: Newcom Media and National Household Survey
CRITICAL ISSUES IN TRANSPORTATION

How often are your trucks detained more than two hours by shippers?

- Frequently: 44.7%
- Half the time: 13.2%
- Rarely: 31.6%
- Always: 5.3%
- Never: 5.3%

Shippers apply charges and penalties of their own. In the past year, has a customer fined you for:

- 44% Lumper services
- 40% Late deliveries
- 36% Damaged/spoiled freight
- 8% No shows (rescheduling/cancelling)
- 8% Broken seals or packaging
- 4% Early deliveries

When detained by shippers, how often does your business collect detention fees?

- Rarely: 42.1%
- Never: 23.7%
- Always: 15.8%
- Frequently: 13.2%
- Half the time: 5.3%

Source: Reader Pulse Survey, Newcom Media