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Transportation's Top Stories

Air Transport Updates

CANADA

✈️ Minister of Transport announces funding to increase supply chain capacity at Toronto Pearson International Airport

On July 7, 2023, the Minister of Transport, the Honourable Omar Alghabra, announced an investment of nearly \$94 million under the National Trade Corridors Fund for a cargo development project at Toronto Pearson International Airport. The project will improve cargo capacity by building two new facilities: the South Cargo Transfer Development Facility (YYZ South) and the North Cargo Apron Development (YYZ North). YYZ South will increase capacity for incoming cargo, and YYZ North will build additional infrastructure for more cargo aircraft parking spaces, which will also increase cargo capacity.

Minister of Transport announces funding to increase supply chain capacity at Toronto Pearson International Airport, July 7, 2023, www.tc.gc.ca

✈️ Transport Canada contracts with autonomous air carrier

Ribbit, a cargo airline startup developing software for autonomous flight, has signed a \$1.3M contract with Transport Canada and Innovative Solutions Canada to begin testing self-flying aircraft in remote regions. The company has completed over 200 hours of hands-free flight on a two-seat airplane, and is rapidly advancing operational testing in preparation for commercial service. The company will provide Transport Canada with a single aircraft along with remote crew and maintenance services to sustain autonomous cargo flights for one year. Transport Canada will use the data gained to help inform future aviation regulations, standards, and policy.

Transport Canada contracts with autonomous air carrier, July 7, 2023, www.insidelogistics.ca

✈️ The Canadian Transportation Agency launches consultations to strengthen air passenger protection



Source: CTA-OTC

On July 11, 2023, the Canadian Transportation Agency (CTA) is launching consultations on proposed amendments to the *Air Passenger Protection Regulations* (APPR), and invites Canadians to participate. The *Budget Implementation Act* introduces changes to the *Canada Transportation Act* (the Act) to clarify, simplify and strengthen the Canadian air passenger protection regime. The CTA will have to make regulations to implement these changes. The consultation period will be open for 30 calendar days and end August 10, 2023. After considering the feedback and comments received, the CTA will publish draft regulations in *Canada Gazette* Part I. There will be an opportunity to review and comment on the draft regulations before they are finalized, approved by the CTA and Cabinet, and published in *Canada Gazette* II. More information about the consultation process can be found on our website, including instructions for providing comments on our Consultation Paper. The *Air Passenger Protection Regulations* came into effect in two stages. On July 15, 2019, airlines were required to meet new obligations concerning communication,

denied boarding, tarmac delay, baggage and the transportation of musical instruments. The remaining obligations on flight disruptions and seating of children came into effect on December 15, 2019. *The Regulations Amending the Air Passenger Protection Regulations*, which include new refunds provisions, came into effect September 8, 2022.

The Canadian Transportation Agency launches consultations to strengthen air passenger protection, July 11, 2023, www.cta-otc.gc.ca

✈️ **\$94 million earmarked for Pearson cargo upgrades**

The federal government is putting up \$94 million to help build two new cargo facilities at Toronto Pearson International Airport. The project will improve cargo capacity by building two new facilities: the South Cargo Transfer Development Facility (YYZ South) and the North Cargo Apron Development (YYZ North). YYZ South will increase capacity for incoming cargo, and YYZ North will build additional infrastructure for more cargo aircraft parking spaces, which will also increase cargo capacity. "It's no secret that the last few years have been difficult on supply chains here in Canada and across the world. Toronto Pearson Airport is a key player in Canada's transportation supply chain, and today's funding of nearly \$94 million is great news for the airport's cargo-handling capabilities, for our supply chains, and for Canadians," said transport minister Omar Alghabra.

\$94 million earmarked for Pearson cargo upgrades, July 11, 2023, www.insidelogistics.ca

✈️ **Air Canada Opens First Maple Leaf Lounge at San Francisco International Airport**



Source: Air Canada

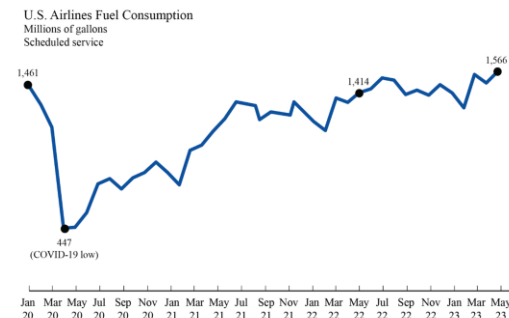
Air Canada has opened its brand-new Maple Leaf Lounge at San Francisco International Airport (SFO), the airline's 28th lounge

worldwide, and its third Maple Leaf Lounge in the U.S. The modern and exclusive respite, located in Terminal 2, features Air Canada's first outdoor lounge terrace, together with a range of premium amenities, food and beverages, making the travel experience for eligible customers even more comfortable and convenient before their flights to Canada and beyond. It provides exclusive 165-seat space, features airline's first outdoor terrace, range of premium amenities. "We're thrilled to bring our Maple Leaf Lounge experience to San Francisco International Airport, giving our Bay Area customers a way to enjoy Air Canada's award-winning product and glowing hearted hospitality from the moment they arrive," said Jacqueline Harkness, Managing Director, Products and Services at Air Canada. "It's one more way we're investing to become San Francisco's favourite way to travel internationally."

Air Canada Opens First Maple Leaf Lounge at San Francisco International Airport, July 12, 2023, www.aircanada.ca

US/WORLD

✈️ **U.S. Airlines' May 2023 Fuel Cost per Gallon Down 8.1% from April 2023; Aviation Fuel Consumption Down 1.1% from Pre-Pandemic May 2019**



Source: BTS

The Department of Transportation's Bureau of Transportation Statistics (BTS) on July 7, 2023 released U.S. airlines' May 2023 fuel cost and consumption numbers indicating U.S. scheduled service airlines used 1.566 billion gallons of fuel, 5.5% more fuel than in April 2023 (1.484 billion gallons) and 1.1% less than in pre-pandemic May 2019. The cost per gallon of fuel in May 2023 (\$2.44) was down 22 cents (8.1%) from April 2023 (\$2.66) and up \$0.33 (15.6%) from May 2019. Total May 2023 fuel expenditure (\$3.82B) was down 3.1% from April 2023 (\$3.94B) and up 14.3% from pre-pandemic May 2019. Year-over-year changes in fuel consumption and cost for May 2023 include 8.3%

increase in domestic fuel consumption, 32.1% decrease in domestic fuel cost, and 37.3% decrease in cost per gallon. Domestic fuel consumption increased 4.5% from April 2023 to May 2023, while decreasing 0.5% from May 2019. Increased fuel consumption reflects an increase in airline passenger travel over the same period.

U.S. Airlines' May 2023 Fuel Cost per Gallon Down 8.1% from April 2023; Aviation Fuel Consumption Down 1.1% from Pre-Pandemic May 2019, July 7, 2023, www.bts.gov

U.S. Cargo and Passenger Airlines Added 1,948 Jobs in May 2023; Employment Remains 8.2% Above Pre-Pandemic May 2019



Source: BTS

U.S. airline industry (passenger and cargo airlines combined) employment increased to 798,850 workers in May 2023, 1,948 (0.24%) more workers than in April 2023 (796,902) and 60,790 (8.24%) more than in pre-pandemic May 2019 (738,060). U.S. scheduled-service passenger airlines employed 521,853 workers in May 2023 or 66% of the industry-wide total. Passenger airlines added 4,342 employees in May 2023 for a twenty-fifth consecutive month of job growth dating back to May 2021. United Air Lines led scheduled passenger carriers, adding 1,194 employees; American Airlines added 958, and Delta added 954. U.S. cargo airlines employed 273,113 workers in May 2023, 34% of the industry total. Cargo carriers lost 1,346 employees in May. FedEx, the leading air cargo employer, decreased employment by 1,195 jobs. *U.S. Cargo and Passenger Airlines Added 1,948 Jobs in May 2023; Employment Remains 8.2% Above Pre-Pandemic May 2019, July 10, 2023, www.bts.gov*



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Rail Transport Updates

CANADA

VIA Rail continues its transformation by breaking ground on construction of cutting-edge Toronto Maintenance Centre

On July 10, 2023, VIA Rail breaks ground on construction at its Toronto Maintenance Centre (TMC). This major upgrade will provide a state-of-the-art maintenance facility for VIA Rail's new fleet of 32 trains in the Québec City-Windsor corridor and is an important pillar in VIA Rail's large-scale modernization which aims to transform the way Canadians travel from reservation to destination. "This modernized maintenance centre will support us in our mission to provide our passengers the most enjoyable travel experience and better connect Canadian communities," said Mario Péloquin, VIA Rail's President and Chief Executive Officer. "It will also allow our employees to work with the most modern equipment and will provide them the necessary tools to maintain the new fleet according to VIA Rail's standards of excellence."

VIA Rail continues its transformation by breaking ground on construction of cutting-edge Toronto Maintenance Centre, July 10, 2023, www.viarail.ca

VIA Rail continues to improve passenger experience with over \$25 million investment in London station upgrades

VIA Rail Canada (VIA Rail) on July 11, 2023 announced over \$25 million in upgrades to its London, Ontario station. Once completed in 2025, these investments will make the station – one of the busiest in VIA Rail's network – a more comfortable, more accessible, and more efficient station and will improve the passenger experience in London.

VIA Rail continues to improve passenger experience with over \$25 million investment in London station upgrades, July 11, 2023,

www.viarail.ca

Minister of Transport announces new funding to improve railway crossing safety in Edmonton, Alberta

On July 11, 2023, the Minister of Transport, the Honourable Omar Alghabra, was in Edmonton to announce a new investment, under the National Trade Corridors Fund, of up to nearly \$31 million for the 50 Street CP Rail Grade Separation and Widening Project. This will improve the safety of a railway crossing and reduce congestion and travel times in the city. This new funding is in addition to the more than \$39 million announced in 2018 for the same project. Improvements that will enhance safety and increase the efficient flow of goods along this key trade corridor route include: 1. A new overpass over the existing railway crossing north of the Sherwood Park Freeway; 2. The construction of two new traffic lanes on 50 Street, increasing the total number of lanes from four to a six-lane divided roadway; 3. The realignment and reconstruction of the intersection at 82 Avenue and 50 Street to maintain important connections between local residential neighborhoods and commercial developments; and 4. The building of new sidewalks and shared-use paths along 50 Street so that people in the city can get where they need to go quickly and safely.

Minister of Transport announces new funding to improve railway crossing safety in Edmonton, Alberta, July 11, 2023, www.tc.gc.ca

US/WORLD

CSX Issues 2022 ESG Report



Source: Railway Age

CSX has released a new environmental, social and governance (ESG) report, “highlighting significant progress the company has made towards advancing its workforce and improving environmental stewardship, social responsibility and governance best practices over the past year,” the Class I announced on July 7. The report was prepared in accordance with leading ESG disclosure frameworks, including the Global Reporting Initiative (GRI) 2021 Universal Standards, the Sustainability Accounting Standards Board (SASB) Rail Transportation standards and the Task Force on Climate-related Financial Disclosures (TCFD), according to [CSX](#).

CSX Issues 2022 ESG Report, July 10, 2023, www.railwayage.com

Canada was 4,271,926 carloads, containers and trailers, down 2.2%; in Mexico, 747,632 carloads and intermodal containers and trailers, up 4.1%; and in the U.S., 12,365,173 carloads and intermodal units, down 5.3%. Canadian railroads reported 83,374 carloads for the week, down 2.7%, and 38,849 intermodal units, down 46.2 percent compared with the same week in 2022. For the first 27 weeks of 2023, Canadian railroads reported cumulative rail traffic volume of 4,271,926 carloads, containers and trailers, down 2.2%.

AAR: North American Rail Volume Down Through 27 Weeks, July 12, 2023, www.railwayage.com

AAR: North American Rail Volume Down Through 27 Weeks



Source: Railway Age

For the first 27 weeks of 2023 (ending July 8), total U.S. weekly rail traffic dipped 4.2% from the same point last year, according to the Association of American Railroads’ (AAR) July 12 report. Both Canada and the U.S. saw declines, while Mexico saw an increase. North American rail volume for the first 27 weeks of the year (ending July 8) on 12 reporting U.S., Canadian and Mexican railroads came in at 17,384,731 carloads and intermodal units. Cumulative volume in



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Marine Transport Updates

CANADA

Over 20 ships wait off Canada ports as dockworker strike drags on and BC port sends ripples across Canadian economy

Canada's two largest Pacific ports — Vancouver and Prince Rupert — remained at a standstill on July 9, 2023 as a strike by the port workers' union passed the one-week mark. Ships are beginning to pile up at anchorages and rail operations serving the U.S. have effectively halted. The British Columbia Maritime Employers Association (BCMEA) claimed on July 6, 2023 that the strike is already having "disastrous economic impacts," with \$4.6 billion in cargo affected since the strike began on July 1 2023. The BCMEA maintained it has offered "significant wage increases." International Longshore & Warehouse Union (ILWU) Canada, representing dockworkers, countered that the BCMEA "has launched a smear campaign targeting their own workers." ILWU President Rob Ashton alleged that the BCMEA is "funding a dirty-tricks media campaign, using anonymous sources to selectively leak misleading information to reporters" so that BCMEA employers won't have to "dip into their massive post-pandemic profits to give their workers a little more." The BCMEA said on July 8, 2023 that it had offered additional concessions and that it was awaiting additional direction from federal mediators. Upto \$775 million in trade per trade has been disrupted as a result of a strike by 7400 dock and warehouse workers in British Columbia

Over 20 ships wait off Canada ports as dockworker strike drags on, July 7, 2023, www.freightwaves.com; and BC port sends ripples across Canadian economy, July 9, 2023, www.globeandmail.ca

Minister of Transport introduces new regulations for enhanced safety and enforcement in Canada's marine transportation system

On July 10, 2023, the Minister of Transport, the Honourable Omar Alghabra, announced new regulations under the *Canada Marine Act*, effective immediately. These regulations allow for enforcement officers to issue administrative monetary penalties, or fines to individuals, corporations, or ships for violations of the Act and its associated regulations, providing them with more flexibility in dealing with situations where rules or standards are not being followed. Fines are an enforcement tool that allow enforcement officers to issue monetary penalties rather than recommending legal action. They allow for a flexible, step-by-step enforcement process that both motivates rule breakers to return to compliance and discourages them from breaking the rules again. The total penalty amounts, up to a maximum of \$5,000 for an individual and \$25,000 for a corporation or ship, vary depending on the severity of the violation and the factors that make it worse or less harmful. This approach is expected to decrease the number of violations in the marine industry as a whole, and ultimately keep the sector and Canadians safe.

Minister of Transport introduces new regulations for enhanced safety and enforcement in Canada's marine transportation system, July 23, 2023, www.tc.gc.ca

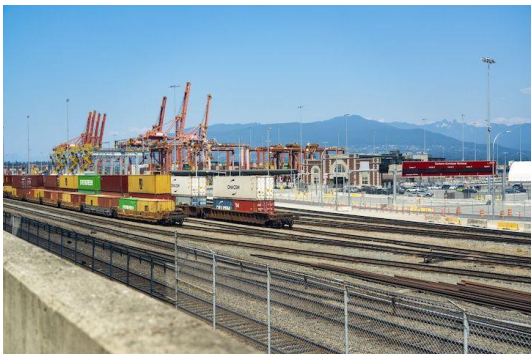
Canadian port worker strike impacts cargo worth billions of dollars



Source: Seatrade Maritime

Some C\$7.5 billion (US\$5.56 billion) worth of cargo has been disrupted by the dockworker strike at Canadian west coast ports according to employers. The BC Maritime Employers Association (BCMEA) said the strike action by the International Longshore and Warehouse (ILWU Canada) had potentially disrupted C\$7.5 billion worth in cargo over a 10-day period. Canadian Manufacturers and Exporters (CME) estimated previously that goods worth C\$500 million a day were being disrupted accounting for some 16% of the country's total goods. The two sides have returned to the negotiating table but the war of words between the BCMEA and ILWU Canada has continued. Canadian dockworkers are being backed by the ILWU south of the border and as Seatrade Maritime News reported on July 10, 2023 US dockworkers say they will not handle ships diverted from Vancouver and Port Rupert to Seattle or other US West Coast ports. *Canadian port worker strike impacts cargo worth billions of dollars, July 10, 2023, www.seatrademaritime.com*

Canada taps mediator to craft deal to end strike at ports



Source: AJOT

Canadian Labor Minister Seamus O'Regan said negotiators have made progress toward a deal to end a strike by dockworkers at some of Canada's busiest ports and he's asked a mediator to get a final agreement done. The strike, which began July 1, 2023 has blocked the flow of goods through major maritime hubs on the Pacific coast, including at the Port of Vancouver and Port of Prince Rupert. The disruption has already hampered the exports of commodities and inbound shipments of manufacturing materials, while fertilizer giant Nutrien Ltd. is curtailing production at a potash mine. "After 11 days of a work stoppage, I have decided that the difference between the employer's and the union's positions is not sufficient to justify a continued work stoppage," O'Regan said in a Twitter post. A deal is within reach and he has asked the senior federal mediator to send a written proposal of settlement terms within 24 hours, he said. Once the minister receives the terms of settlement, he'll forward them to the International Longshore & Warehouse Union and the British Columbia Maritime Employers Association, which will then have 24 hours to decide whether to recommend that deal to their members. *Canada taps mediator to craft deal to end strike at ports, July 12, 2023, www.ajot.com*

It's over: Labor deal ends strike at Vancouver, Prince Rupert ports



Source: Freightwaves

After being shuttered for 13 days, the key container shipping ports of Vancouver and Prince Rupert in British Columbia, Canada, will open "as soon as possible" after a new labor deal was reached, the British Columbia Maritime Employers Association (BCMEA) announced on July 13, 2023. The tentative agreement has a four-year term and is subject to ratification by both parties. No details were disclosed. The announcement of the end of the port labor impasse came after a federal mediator delivered recommendations to both sides with a tight deadline to respond. The near-two-week strike led to a virtual

shutdown of containerized rail moves from Vancouver and Prince Rupert to the U.S. Even though the British Columbia ports will reopen soon, the effect on the flow of U.S. imports via the Canadian gateways will linger. [Canadian railway CN told FreightWaves](#) that disruptions could take weeks or even months to correct. Data from FreightWaves SONAR that tracks rail moves of loaded international containers from Vancouver and Prince Rupert shows a near-total collapse in volumes as a result of the strike.

It's over: Labor deal ends strike at Vancouver, Prince Rupert ports, July 13, 2023, www.freightwaves.com

Statement on Tentative Labour Agreement

The Prince Rupert Port Authority (PRPA) commends the ILWU and the BCMEA for reaching a tentative agreement that provides the opportunity for short-term operational recovery and a return to long-term stability at Canadian transpacific gateways, as well as Federal Minister of Labour Seamus O'Regan and the Federal Mediation and Conciliation Service for their leadership through the mediation process. The Prince Rupert Port Authority and our supply chain partners, and local ILWU members in particular, have collectively built a global reputation for speed and reliability and together we are now completely focused on operational recovery and quickly re-establishing fluidity and productivity to build back that well-earned competitive position in the shipping industry. We are ready to restore the advantage that Team Prince Rupert has demonstrated in the past. PRPA continues to advance its plans to further expand terminal, logistics and infrastructure capacity and capabilities to meet the future needs of transpacific trade and Canada's trade ambitions.

Statement on Tentative Labour Agreement, July 13, 2023, www.rupertport.com

The Government of Canada announces new measures in force with passage of Budget Implementation Act to modernize marine protection and safety as part of the Oceans Protection Plan

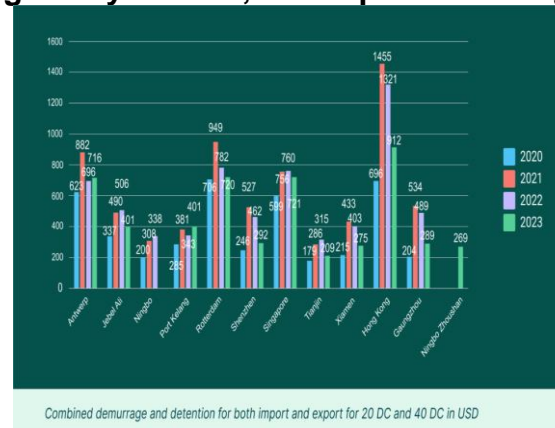
On July 12, 2023, the Minister of Transport, the Honourable Omar Alghabra, announced that with the passage of Bill C-47, the *Budget Implementation Act*, new legislative changes to help the Government of Canada protect our oceans are now in force. This includes new measures to strengthen marine safety, respond faster and more effectively to more types of marine pollution, to take action on abandoned boats in our waters, and to provide better compensation for communities impacted by a spill. Three acts - the *Canada Shipping*

Act, 2001, the Marine Liability Act, and the Wrecked, Abandoned or Hazardous Vessels Act – have been amended as part of Canada's Oceans Protection Plan to strengthen marine safety on our waters. These changes will: 1. Provide faster access during incidents to port and emergency services, such as marine firefighting and emergency towing; 2. Reinforce the preparedness and response to marine incidents that involve hazardous and noxious substances, in addition to oil. Vessel and facility operators will be required to report hazardous and noxious substance spills and have response plans; 3. Strengthen enforcement of safer navigation by all vessels; 4. Introduce penalties for companies such as importers, manufacturers, and retailers of pleasure craft if they do not attach proper identification information and serial numbers to boats; 5. Establish a Vessel Remediation Fund to finance activities that will assess, address, and prevent problem vessels from becoming hazards to navigation; and 6. Improve the compensation available after a spill for all types of harvesting including fishing, hunting, and gathering of Indigenous traditional medicines, and expand the amount for future losses.

The Government of Canada announces new measures in force with passage of Budget Implementation Act to modernize marine protection and safety as part of the Oceans Protection Plan, July 12, 2023, www.tc.gc.ca

US/WORLD

Average demurrage and detention charges witness a 25% dip globally in 2023; 7 U.S. ports rank highest



Source: AJOT

Average Demurrage and Detention charges register a year-on-year decline of 25% in 2023, with a significant 14% decrease compared to

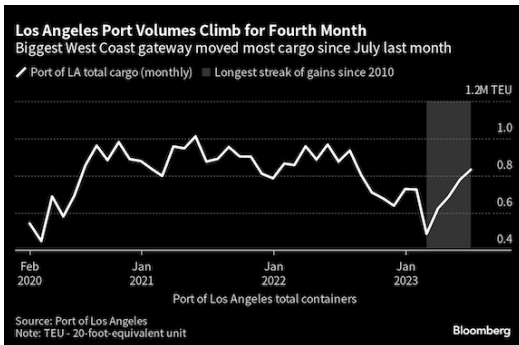
the rates in 2020, as found by Container xChange's annual Demurrage and Detention Charges benchmark report 2023. However, there are still 11 ports where Demurrage and Detention fees remain higher as compared to 2020. These ports include Antwerp, Jebel Ali, Ningbo, Port Kelang, Rotterdam, Shenzhen, Singapore, Tianjin, Xiamen, Hong Kong, and Guangzhou. In an exclusive webinar held in July'23, a powerful panel of speakers from Drewry, S&P Global, and Container xChange discussed the impact of these charges on shippers worldwide amidst the changing dynamics of demand and supply for containers on a global scale. "There are multiple factors contributing to the inability of these ports to return to normalcy. The significant increase in energy prices, coupled with higher labor costs, and escalating land expenses and port fees, have all played a part," stated Chantal McRoberts, Director, DSCA Advisory, Drewry.

Average demurrage and detention charges witness a 25% dip globally in 2023; 7 U.S. ports rank highest, July 7, 2023, www.ajot.com

without the shocks of the past three years. For the first half of this year, the port has handled 4.1 million units, 24% less than a year earlier. Through the first half of 2019, volume totaled 4.54 million. "Although we will likely see cargo ease in July, I'm optimistic that the second half of 2023 will show improved performance compared to the first six months," Port of Los Angeles Executive Director Gene Seroka told reporters.

Los Angeles port sees June cargo rise 70% from February low, July 13, 2023, www.ajot.com

Los Angeles port sees June cargo rise 70% from February low



Source: AJOT

The Port of Los Angeles saw cargo volumes rise for the fourth straight month in June 2023 as US trade patterns return to pre-pandemic patterns. The maritime gateway moved 833,035 units in June 2023, the most since July last year, and about 70% more than in February 2023, which was the lowest since the start of the pandemic, it said on July 12, 2023. Volumes at the biggest West Coast port operation are recovering after they plunged in part as US importers diverted shipments to East and Gulf facilities during labor contract talks that dragged on for more than a year. Major ports like Los Angeles and other key links in global supply chains are almost fully free of pandemic congestion and the shipping disruptions caused by Russia's war in Ukraine. While so-called normal operations are hard to pin down, comparisons to 2019 offer more clarity about the health of global trade



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Road Transport Updates

CANADA

Government of Canada announces new measures to improve commercial vehicle safety

On July 10, 2023, the Minister of Transport, the Honourable Omar Alghabra, announced that, in addition to existing measures, enforcement officers will be able to impose fines to drivers or companies who violate the Commercial Vehicle Drivers Hours of Service Regulations. The change was made possible by amending the Contraventions Regulations, which provided new ways to spell out contraventions in the Hours of Service, including the amount of fines. The Hours of Service Regulations are critical for promoting road safety as they mandate how long commercial drivers can operate their vehicles before they need rest. They also outline logging and reporting requirements for commercial vehicles and fleet operators.

Government of Canada announces new measures to improve commercial vehicle safety, July 23, 2023, www.tc.gc.ca

Convenient access to public transport in Canada



Source: Statcan

Canada's three largest census metropolitan areas (CMAs) (Toronto, Montréal and Vancouver) had higher rates of convenient access to public transit, each with over 82% of residents living within 500 metres of a public transit stop. CMAs with fewer than 500,000 residents tended to have lower rates of convenient access to public transportation, generally ranging from 37% to 79%, with a few notable exceptions. Residents of Victoria, Regina and Red Deer, for example, had relatively higher rates of convenient access (ranging from 84% to 93%) compared with other CMAs. In contrast, residents of Oshawa (62%) and Windsor (50%) had lower rates of convenient access to public transit for cities of their size.

Convenient access to public transport in Canada, July 11, 2023, www.statcan.gc.ca

New federal fines for Hours of Service, ELDs, range from \$300 to \$2,000



Source: Today's Trucking

Truck drivers and carriers face 60 new federal fines for Hours-of-Service violations – including those specific to mandated electronic

logging devices (ELDs). Coming in three tiers, the fines range from \$300 to \$1,000 for drivers, and \$600 to \$2,000 for motor carriers. The lowest tier includes administrative and minor recordkeeping contraventions. A second tier includes on-duty/drive limitations; off-duty requirements; more serious recordkeeping contraventions that increase risk; and contraventions that make it difficult to enforce carrier compliance. Topping the scales are fines for tampering, falsifying or obstructing records, and the most serious on-duty/driving limitations and rest requirements. Now included in *Contraventions Regulations*, the infractions can be addressed through tickets and voluntary payments of prescribed fines, rather than court appearances.

New federal fines for Hours of Service, ELDs, range from \$300 to \$2,000, July 12, 2023, www.todaystrucking.com

report is “Bouncing Along the Bottom.” “The volume downturn appears to be in the later innings, and after a long soft patch, we see the U.S. freight transportation industry on the cusp of a new cycle,” Tim Denoyer of ACT Research wrote in commentary accompanying the release of the June Cass data. But the period that Denoyer said the freight market is moving into is what he calls “cycle bottoming.” In the graphic that accompanied the report, that cycle is marked by several features: loose capacity, pricing power to the shipper, low Class 8 tractor production, rates falling more slowly and order cancellations increasing. Overall, the biggest features highlighted on the “wheel” for cycle bottoming are that “demand declines and capacity growth slows.” *Monthly Cass report suggests freight market bottom may be near, July 12, 2023, www.freightwaves.com*

US/WORLD

Building on the Success of DOT’s Rural EV Toolkit to Help Communities Build Out EV Charging Infrastructure, DOT Releases New Edition for Urban Areas

On July 12, 2023, the U.S. Department of Transportation, in collaboration with the U.S. Department of Energy and the Joint Office of Energy and Transportation (Joint Office), released a free technical resource to help larger communities take full advantage of Federal funding for electric vehicle (EV) charging stations and other forms of electric transportation. It follows the popular Rural EV toolkit released last year and updated earlier this summer. The new guide is called *Charging Forward: A Toolkit for Planning and Funding Urban Electric Mobility Infrastructure*. President Biden’s infrastructure law dedicates \$7.5 billion to help communities of all sizes get EV chargers where drivers will need them, creating good-paying manufacturing and installation jobs along the way

Building on the Success of DOT’s Rural EV Toolkit to Help Communities Build Out EV Charging Infrastructure, DOT Releases New Edition for Urban Areas, July 12, 2023, www.dot.gov

Monthly Cass report suggests freight market bottom may be near

In a freight market where the seemingly permanent prevailing question is, “Are we at the bottom, and if not, when is the bottom?,” Cass Freight Index data continued to report weak numbers but with some suggestion that a bottom may be near. The headline on this month’s



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Other Transport Updates

CANADA

Leading indicator of international arrivals to Canada, June 2023



Source: Statcan

In June 2023, the number of international arrivals to Canada, including non-resident trips and returning Canadian resident trips, continued to increase relative to June 2022. However, the number of arrivals has not yet reached the levels recorded in June 2019, prior to the COVID-19 pandemic. The number of non-resident arrivals at Canadian airports equipped with electronic sensors reached 1.2 million in June 2023, up 37.8% from June 2022. Additionally, the number of Canadian residents returning from visiting abroad amounted to 1.1 million trips, up 26.6% from June 2022. In June 2023, US-resident trips to Canada through land ports with electronic sensors totalled 1.4 million, up 60.2% from the same period the year before. Furthermore, the number of Canadian residents returning from the United States via the same land ports increased by 37.7% to reach 1.8 million trips in June 2023.

Leading indicator of international arrivals to Canada, June 2023, July 11, 2023, www.statcan.gc.ca

Consumers want sustainable delivery, study finds

A majority of consumers are interested in environmentally friendly delivery methods, and are willing to act if they feel a retailer is not meeting standards. A new study of home delivery preferences found 43 percent of consumers felt retailers were doing a good job of using sustainable delivery practices, while 59 percent said they are willing to act if they're not satisfied with retailers' sustainable delivery efforts. The study of 8,000 consumers across nine European countries, Canada and the United States was produced by Descartes Systems Group. "Compared to our 2022 study, consumers are much more interested in the environmental delivery practices of retailers. They're influenced by these factors when making purchasing decisions and willing to take eco-friendly home delivery options, which are often also lower cost delivery methods for retailers," said Chris Jones, EVP, industry at Descartes.

Consumers want sustainable delivery, study finds, July 13, 2023, www.insidelogistics.ca

US/WORLD

New Zealand signs 'ambitious' trade deal with EU



Source: Cargo News

The European Union and New Zealand have signed a free trade agreement which Brussels says can lift exchanges between the two by 30% with a decade. The deal, agreed in June 2022 after four years of tough negotiations, is "ambitious", said European Commission President Ursula von der Leyen.

New Zealand signs 'ambitious' trade deal with EU, July 7, 2023, www.cargonews.com

June 2023 U.S. Transportation Sector Unemployment (3.3%) Falls Below the June 2022 Level (4.1%) And the Pre-Pandemic June 2019 Level (4.1%)

U.S. Unemployment Rate (Not Seasonally Adjusted)	Transportation Sector Unemployment Rate (Not Seasonally Adjusted)
June 2023 3.8%	June 2023 3.3%
↔ 0.0 change from same month last year	▼ -0.8 change from same month last year

Source: BTS

The unemployment rate in the U.S. transportation sector was 3.3% (not seasonally adjusted) in June 2023 according to Bureau of Labor Statistics (BLS). These data have been updated on the Bureau of Transportation Statistics' (BTS) Unemployment in Transportation dashboard. In June 2023, the transportation sector unemployment rate fell 0.8 percentage points from 4.1% in June 2022 and was below the pre-pandemic June 2019 level of 4.1%. Unemployment in the transportation sector reached its highest level during the COVID-19 pandemic (15.7%) in May 2020 and July 2020. Unemployment in the transportation sector was lower than overall unemployment. BLS reports that the U.S. unemployment rate, not seasonally adjusted, in June 2023 was 3.8% or 0.5 percentage points above the transportation

sector rate. Seasonally adjusted, the U.S. unemployment rate in June 2023 was 3.6%. *June 2023 U.S. Transportation Sector Unemployment (3.3%) Falls Below the June 2022 Level (4.1%) And the Pre-Pandemic June 2019 Level (4.1%), July 10, 2023, www.bts.gov*

May 2023 Freight Transportation Services Index (TSI) Up 1.2% from the Previous Month and Down 1.4% from the Same Month Last Year



Source: BTS

The Freight Transportation Services Index (TSI), which is based on the amount of freight carried by the for-hire transportation industry, rose 1.2% in May 2023 from April 2023, rising for the first month after two consecutive months of decline, according to the U.S. Department of Transportation's Bureau of Transportation Statistics' (BTS). From May 2022 to May 2023 the index fell 1.4% *May 2023 Freight Transportation Services Index (TSI) Up 1.2% from the Previous Month and Down 1.4% from the Same Month Last Year, July 13, 2023, www.bts.gov*



Job Postings

* **Principal Planner: Freight Planning, North Jersey Transportation Planning Authority**

Under the direction of the Director of Freight Planning, the Principal Planner: Freight Planning will be responsible for performing a full range of technical planning, research, analysis, written reports, and outreach activities in the specialized field of freight and goods movement planning. The job requires knowledge of goods movement, the application of tools of analysis, the ability to research freight and related topics and produce reports, as well as the ability of effectively engage and interact with stakeholders in the public and private sector. To apply, please click here:

<https://njit.csod.com/ux/ats/careersite/1/home/requisition/4582?c=njit>

* **GLG, looking for consulting experts in various transportation and logistics fields**

We have been approached by GLG, a bona fide professional services organization which provides hourly consulting services, looking for experts in various transportation and logistics fields. These are done over the phone or in a web meeting (not in person). If you would like to be considered as a candidate (GLG typically pay up to \$200/hr. for these 30 minute or 60 minute consultations) for any of these please let Andrew Young know and he will put you in contact with them (uschapter@ciltna.com).

Diesel-to-Electric Battery Repowering | Trains, Trucks, or Boats

One of our clients, a railcar manufacturer, would like to speak with an expert who is knowledgeable about repowering heavy machinery, such as trains, boats, and trucks. More specifically, they're looking to better understand what it takes to go from diesel to electric battery powered, as well as who the leading suppliers of key components are (e.g., power control systems, inverters, batteries, motors, etc.).

Project Questions

- Do you have experience repowering heavy machinery, such as trains, boats, or trucks? If so, please elaborate on your relevant experience below.
- Are you able to discuss the repowering design, specifically what it takes to transition from conventional diesel to electric battery powered?
- Are you knowledgeable about suppliers of key repowering components (e.g., power control systems, inverters, batteries, motors, etc.)? If so, please note which component suppliers you could elaborate on during a call below.

Fleet Management | Market Overview

One of our clients, a project team at a professional services firm, would like to speak with individuals that have in depth knowledge on the truck fleet management space. Topics of interest include:

- Products offered by truck fleet management companies
- Value chain
- Products
- Market size, areas for growth, and top players in the space

Please Note: Our client is working on behalf of a corporation or investment firm. GLG Network Members are not permitted to consult about their current employer(s) or provide any information that may be considered confidential or proprietary to their current or former employers or other third parties.

Project Questions

- Can you list what are the main products that a truck fleet management company offers?
- On a scale from 1-5 (1=not able to speak, 5=extremely knowledgeable), how knowledgeable are you on the following topics related to fleet management:
 - Who do you believe are the 3-5 main truck fleet management companies and who has been gaining market share in the last 5 years?

- Can you speak to what is the average gross margin that fleet management companies generally have combining all products and services? (in %)

Fleet Operations | Fleet Manager Perspective

One of our clients, a project team at a professional services firm, would like to speak with professionals with fleet management experience across truck, rail, maritime, or aviation fleets.

Please Note: Our client is working on behalf of an Oil & Gas Provider. GLG Network Members are not permitted to consult about their current employer(s) or provide any information that may be considered confidential or proprietary to their current or former employers or other third parties.

Project Questions

- Roughly how many vehicles are/were included in your fleet?
- Are you involved in the evaluation and decision-making process for fuel choices and alternative products used in your fleet? Please select which best represent your relevant experience.
- Are you familiar with fuel alternative products ("green fuel", biofuels, etc.)? Please briefly elaborate on your experience in 1-2 sentences.
- Can you speak to your preference of fuel vs. fuel alternative products and your rationale? Please briefly elaborate in 1-2 sentences.
- Could you provide examples of and speak to companies that are selling fuel alternative products in the market today? What are your perceptions of these companies?
- Can you speak to the fuel alternative products in the market today? What are your perceptions of these products? What has influenced your perception? Please briefly elaborate on your ability to discuss in 1-2 sentences.
- Could you provide examples of when you have utilized fuel alternatives within your business/at your place of work? What were the advantages? The disadvantages? Please briefly elaborate on your ability to discuss in 1-2 sentences.
- Could you speak to making purchase decisions regarding fuel alternatives? What were your considerations? What ultimately influenced your decision? Please briefly elaborate on your ability to discuss in 1-2 sentences.
- Could you speak to the sources/influences that you consulted during this buying process? Please briefly elaborate on your ability to discuss in 1-2 sentences.
- Does your CURRENT company compete with Oil & Gas Manufacturers.
- Do you have current/recent experience (within 0-2 years) in fleet management across any of the following segments?

Freight Brokerage Services | Overview

One of our clients, an analyst at an investment management firm, would like to speak with a Network Member who can speak on the freight brokerage services space. Topics of discussion include:

The unique dynamics of fresh produce / temperature-controlled shipping

- Defensive actions to take during a brokerage downturn
- Main drivers of freight brokerage financials
- Up and coming tech platforms for freight brokerages

GLG Network Members are not permitted to consult about their current employer(s) or provide any information that may be considered confidential or proprietary to their current or former employers or other third parties.

Project Questions

- Can you speak to the unique dynamics of fresh produce/temperature-controlled shipping? If so, please elaborate on your ability to do so below.
- Have you navigated a downturn at your brokerage? If so, can you speak on the defensive actions that were taken?
- Can you speak on the main drivers of freight brokerage financials? If so, please elaborate in 1-2 sentences on your ability to do so below.
- Can you speak on any emerging tech platforms for freight brokerages? If so, please elaborate on them below.
- Do you have any off-limit topics and/or anything you might be contractually obligated not to discuss regarding this consultation or space? If so, please briefly elaborate on the topics you are not allowed to discuss.



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