

Approximately 37% of the value and 73% of the tonnage of exports to LDC's is shipped directly from Canadian ports. The next most popular arrangements are: (a) using freight forwarders who select ports and routings, (b) U.S. seaports, and (c) Canadian and U.S. airports.

4. OCEAN TRANSPORTATION

The survey demonstrated the significant reliance of Canadian exporters upon ocean transportation services in marketing their products throughout the LDC's. Surveyed exporters booked space with ocean carriers for \$880.8 million in exports (almost three-quarters of the total) compared to \$38.3 million via air carriers (three per cent); forwarders or sales agents' arranged transportation for the remainder and probably utilized ocean carriers for the majority of shipments.

4.1 SATISFACTION WITH MARINE TRANSPORTATION SERVICES

Figure 5 describes shippers' level of satisfaction with various ocean carrier performance factors. Canadian exporters report no common overwhelming problems with any specific aspect of marine transport service. The most dissatisfaction expressed by shippers is under the category of responsiveness of ocean lines to negotiate rates, particularly when exporting to South America. The highest average rating for any factor is the low frequency of damage and claims occurring in shipments to Central America. Since almost all of the average ratings exceed 5 on a scale of 10, it is concluded that Canadian exporters are at least somewhat satisfied with ocean transportation services to LDC's.

Although these results indicate an overall feeling of general satisfaction with regard to ocean carrier performance, this does not mean that Canadian exporters experience no problems in shipping to LDC markets. As is apparent from Table 4, just under 43% of the exporters claim that they have experienced problems of some sort in arranging marine shipments to LDC's. However, this response does not necessarily imply that a firm experiences consistent or recurring difficulties. Specific problems seem to occur relatively infrequently, and thus are not of great concern to most individual shippers.