

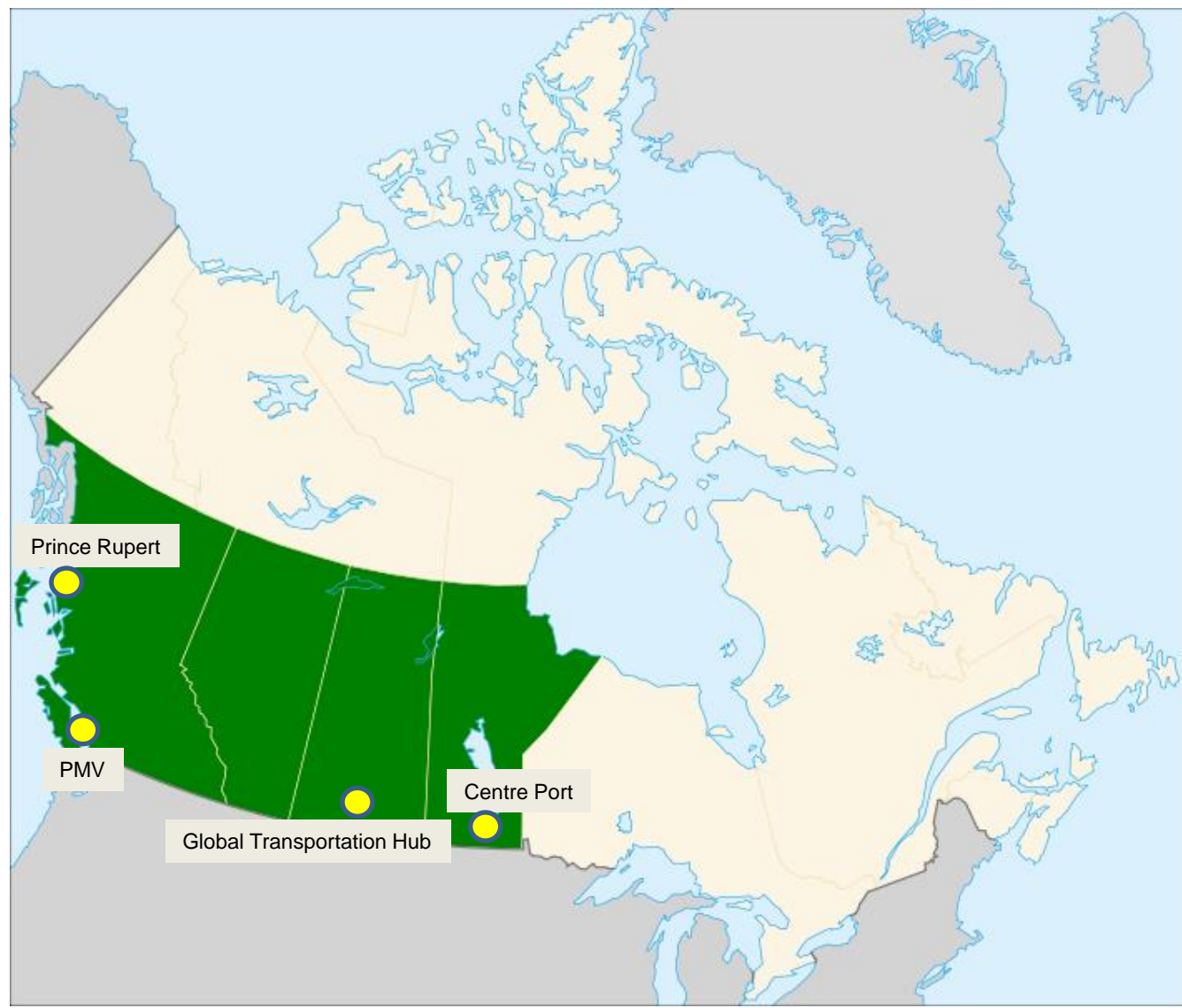
Session 3: Calgary Region: Inland Port and Gateway to Asia

**The Calgary Region as a
Transportation Hub Conference**

Calgary, Alberta

November 20, 2014

Western Canada Ports Tour



Initial reaction

- **Individually, these hubs are**
 - effective and efficient in their own right,
 - individually, with growth plans,
 - having different operating constraints,
 - seizing opportunities, and
 - with different governance structures.
- **Relevant in terms of their impact on regional trade outcomes, e.g.**
 - CentrePort – access to Emerson border Crossing
 - Strong link to air cargo / courier shipments
- **Delivering value to the jurisdictions**

Inland Hubs

- **Location**
 - Access to high capacity roadways
 - Perimeter Highway (CentrePort)
 - Regina Bypass Project (Global Transportation Hub)
- **Multimodal Access**
 - Air/Road/Rail (CentrePort)
 - Road/Rail (GTH)
- **US Border Access**
 - Highway connections

West Coast Ports

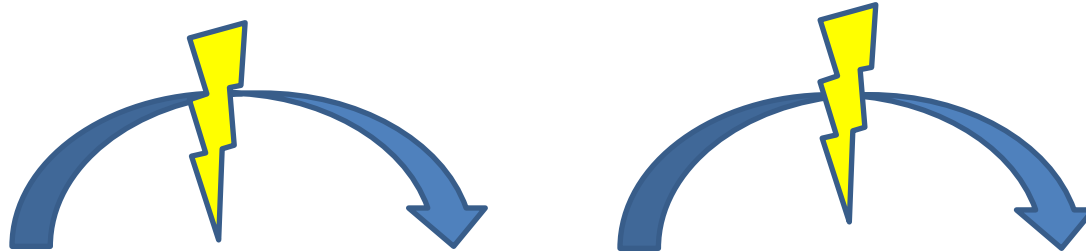
- **Port Metro Vancouver**
 - Handles 20% of Canada's trade \$
 - Very effective integrated port operations, traffic management – marine, rail, road
 - Terminal capacity not seen as a constraint on the short – medium term
 - Major issue in terms of growth – constraints in terms of rail corridor capacity
 - Significant investment in grade separations to improve the flow of road/rail traffic

West Coast Ports

- **Prince Rupert**

- Falloff in tourist traffic has shifted focus to resource traffic
 - Grain, coal, potash, wood pellets, potential LNG
- Efficient container handling facility,
- Deepwater port, efficient pilotage time
- Port layout and community investment – positive social licence.
- Ridley Island development will be a significant enhancement.
- Superior rail connection (elevation)

System issues



Shippers

- Mostly uncoordinated
- Expectations high
- Lack of integration
- Scrambling to find carrier options
- Long distances
- Limited service options

Carriers (Road/Rail)

- Driving for efficiency
- Pursuing reduced operating costs
- Manpower pressures
- Ageing infrastructure
- Fluctuating volume demands
- Surge capacity
- Weather issues
- Regulatory impact
- Expectations high
- Lack of integration

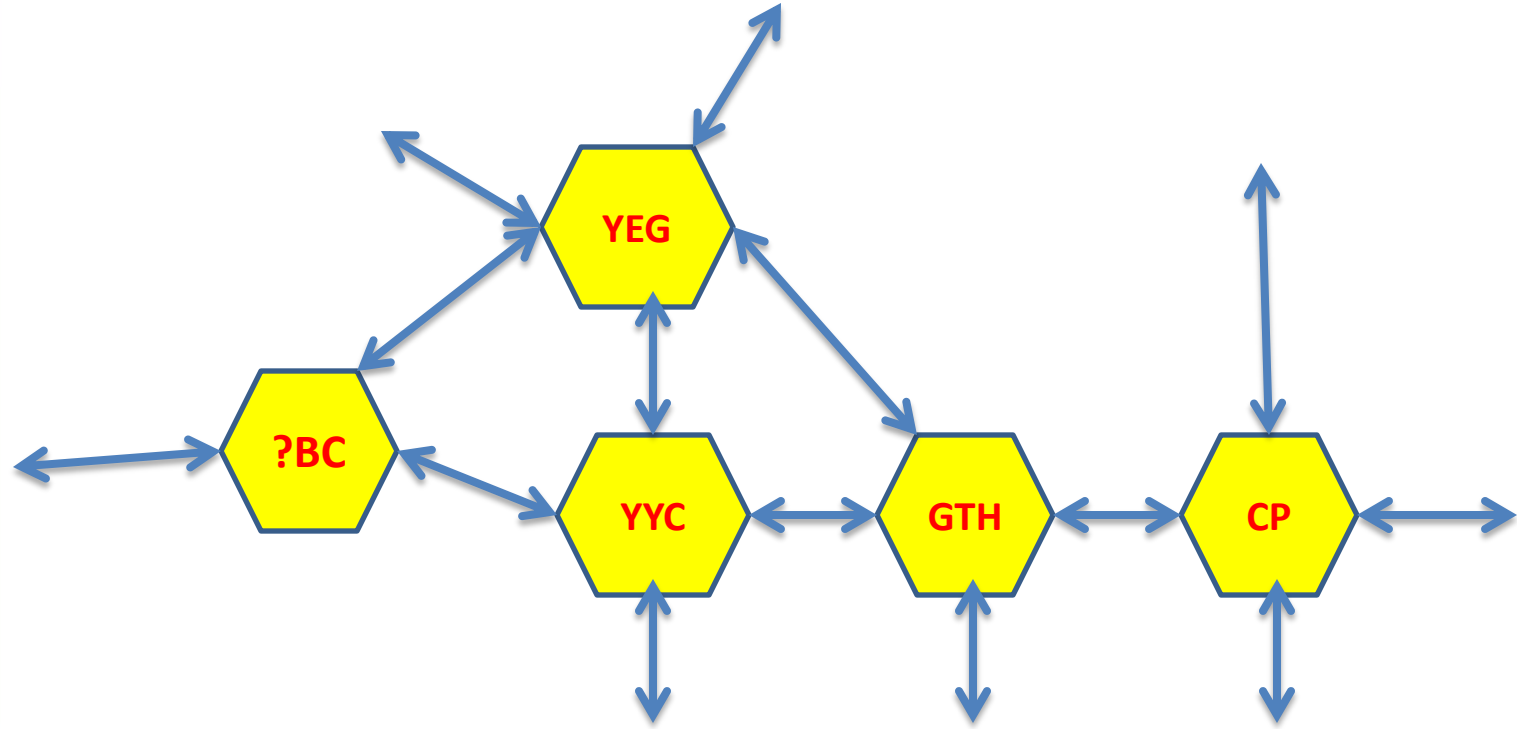
Ports

- Driving for efficiency
- Pursuing reduced operating costs
- Congestion and storage issues
- Environmental and land pressures
- Infrastructure renewal and modernisation
- Competing for cargo
- Bulk/break bulk
- Container issues

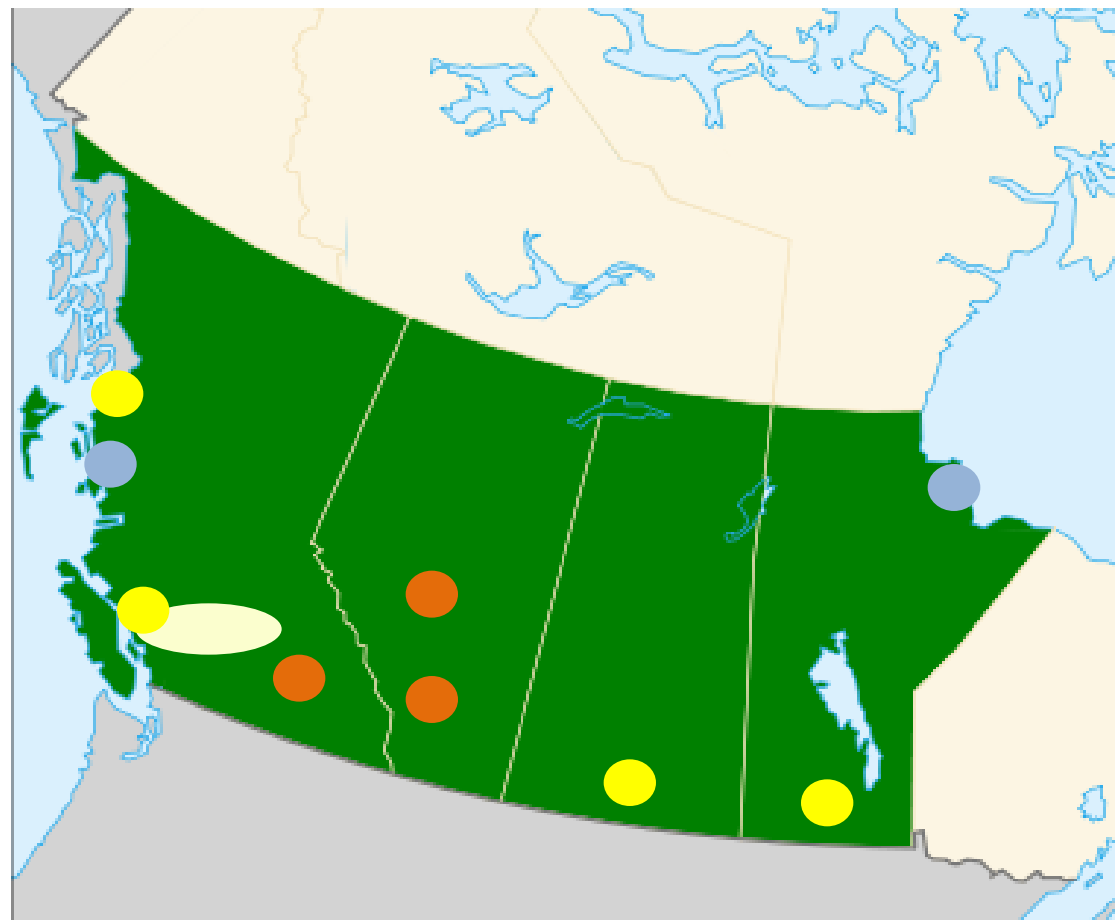
Going Forward

- **Need for a systems approach**
 - Address weak points in the chain
 - Build capacity to deal with surges
 - Need for coordinated, integrated front end arrangements
 - Address congestion in both road and rail modes
 - Find solutions to road/rail logistic choke points at tidewater destinations
 - Capitalize on N-S and E-W network options to overcome weather/other event related disruptions

Going Forward



Western Canada Supply Chain to 2030/2050?



Conclusion

- **Development of corridor based on**
 - Interconnected hubs
 - Multiple entry points for shippers
 - Hubs to enable unit train build
 - Coordinated logistics to ease congestion on rail into lower mainland through
 - Multiple routes into US network
 - Route redundancy