



Advantage North
Transport Challenges to Solutions
Edmonton Airports
May 28-30, 2007

Global Air Traffic and Trade

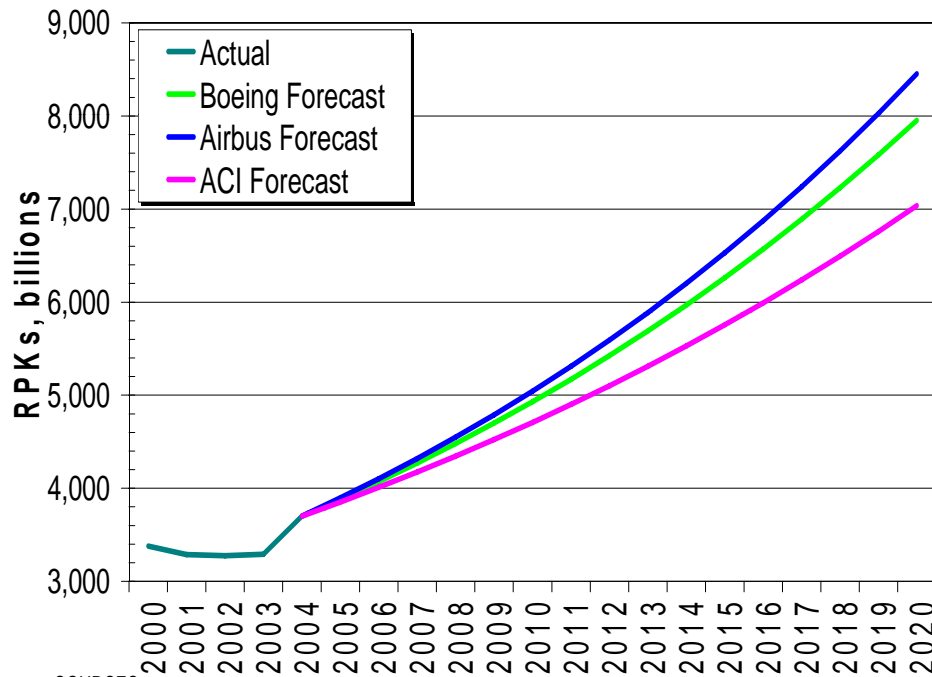
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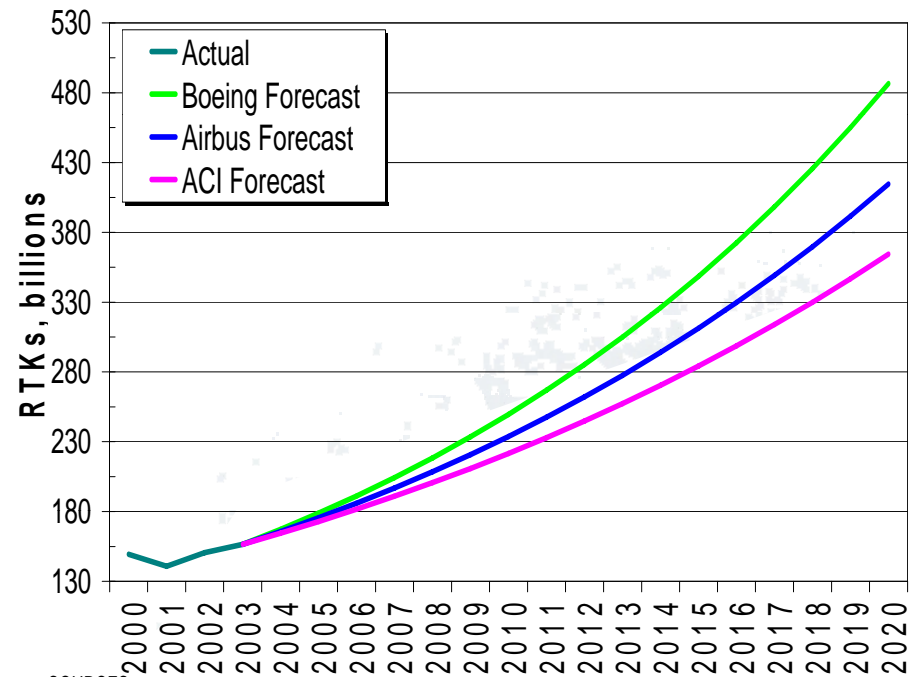
World Passenger Growth 2000-2020



SOURCES:

- Boeing 2006 Current Market Outlook
- Airbus Global market Forecast 2004-2023
- ACI Worldwide Air Transport Forecasts 2005-2020

World Cargo Growth 2000-2020



SOURCES:

- Boeing 2006 Current Market Outlook
- Airbus Global market Forecast 2004-2023
- Boeing 2004/5 World Air Cargo Forecast
- ACI Worldwide Air Transport Forecasts 2005-2020

Emerging Markets – the BRIC

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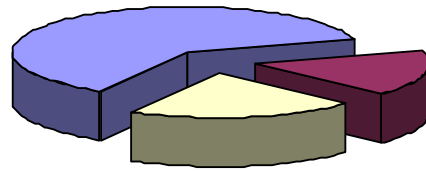
- Asia
 - China & India
 - Currently constructing 30+ greenfield airports.
 - 10.5 million Chinese tourists in 2005
 - Over 100 million forecasted for 2015
 - Will lead Air Cargo growth for the next two decades. (Boeing)
- Russia/Eastern Europe
 - Growing economies and competitive to Asia in EU markets.
 - Improving Air infrastructure
- South America
 - Brazil is diversifying.
 - Leveraging labour costs to compete globally.
 - Air networks are growing.

Canadian Air Market Profile

Canadian Passenger Traffic Distribution

62%
Domestic

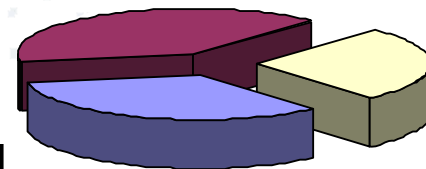
17%
International



21%
Transborder

40%
International

Canadian Cargo Traffic Distribution



33%
Domestic

27%
Transborder

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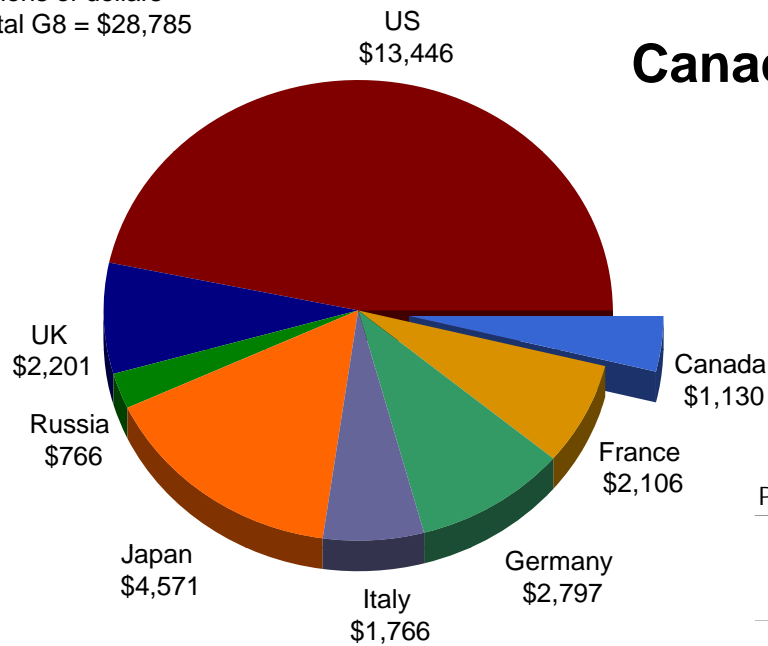
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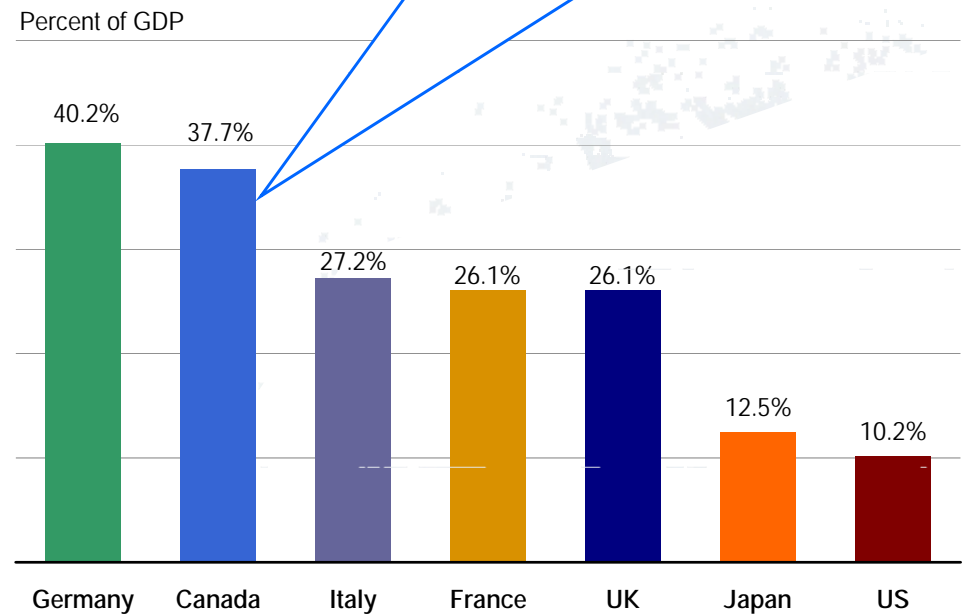
Canadian Trade

Billions of dollars
Total G8 = \$28,785



Canada is a small, open economy....

**Canada has
2nd highest reliance
on international trade**



...reliant on trade

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March Year to Date Growth Rates

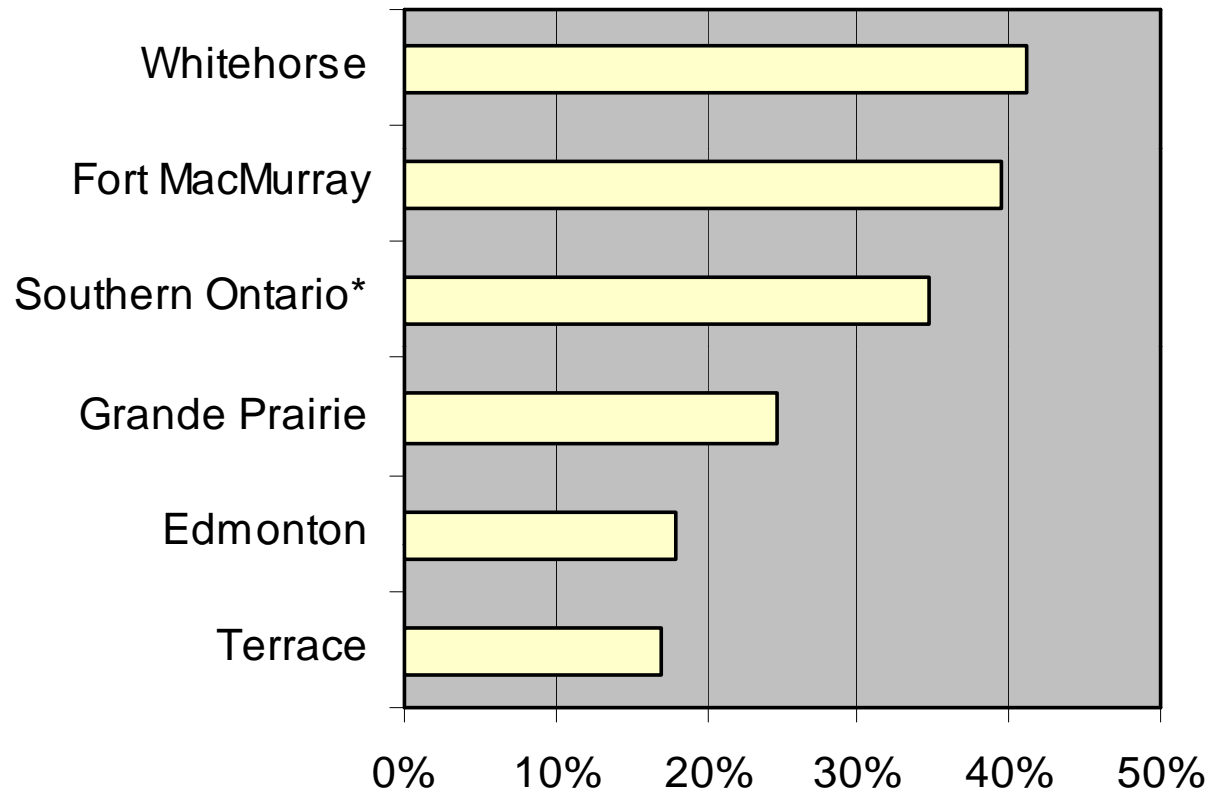
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2006/07 percent change



* Toronto Island/Windsor/Hamilton

Where's the Growth?



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- Low Density Population
 - Carriers focus on high traffic
- Distances – Aircraft Utilization
 - RPK (revenue/passenger-kilometer)
- Air is a Capital-Intensive business
 - Airports have significant capital costs and limited Infrastructure funding.
- Regulatory Policy
 - Bilaterals/Security/Facilitation/Airports Act

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- Resource development
 - Oilsands / diamond mines / pipelines
- Asia economic growth
 - Ports of Prince Rupert and Vancouver / Great Circle Route
- Economic strength
 - Higher than average GDP growth
- Coordinated Clearance Program
 - Nexus
- Open skies / bilateral improvements

How do we leverage our strategic assets to take advantage of globalization?

Canada's Blue Skies Policy

- Previous International Air Policy
 - Protectionist to ensure Canada's Carriers had safety from overseas competition.
 - Allocated markets to ensure two major carriers had equal balance.
 - Ingrained to the extent that policy benefited only one remaining International Carrier.
- New International Air Policy
 - 'Open Skies' as a stated goal.
 - Removal of barriers to trade.
 - Recognition that Air Canada needs no safety net to compete.

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Edmonton Airports

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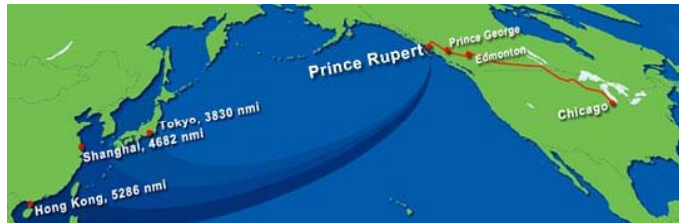
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- Canada's fastest growing major airport.
- Year-to-date passenger volumes up by 17 per cent over 2006.
- 5.4 million passengers in past 12 months.
- Passengers volume up over 30% in past 3 years.
- Cargo growth strong – Port Alberta.

Strategic Location

First major center in North America from the Port of Prince Rupert - with existing rail service to the Port of Vancouver.



Most northern major airport at the intersection of existing global air routes.

Immediate access to the CANAMEX corridor, Yellowhead and Alaska highways, as well as the nexus of the northern Alberta highway system.



Adjacent to the largest industrial park in Canada and second largest in North America for oil and gas manufacturing.

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- Inland port
 - Capitalizing on its strategic location.
- Multi-modal transportation hub
 - combining the efficiencies of air, rail and road transportation infrastructure at a single point to serve all markets.
 - Regional
 - National
 - Global

An enabler for a sustainable future.

Why?

- Connecting Edmonton and the Region to a competitive global marketplace.
- Targets markets and time-based competition as keys to business success.
- Leverages the gateway to attract industry and boost commercial trade.
- Enhances personal appeal of community advantages.
- Depends on key variables:
 - Speed
 - Access
 - Agility
 - Connectivity

21st Century is focused on
Aviation

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