

2014 SPRING MEMBER FORUM
DEMAND PICTURES:
TRADE FLOWS AND CAPACITY UPDATES

APRIL 1 & 2, DELTA HOTEL, WINNIPEG

The ability of the transportation system to have sufficient capacity to serve the needs of Western Canadian exporters and importers rests on having the best available demand outlooks. At this meeting, experts will provide insights on the demand outlook for the major commodity exports and containerized trade.

The Forum Program will commence with an overview of the global drivers of demand. The program will then get more specific, focusing on Western Canada's commodities, goods and trade flows. An update on the global trade agenda, protectionism and the impacts of new trade agreements will also take place. Members will address the implications on transport system capacity.

Register online: www.westac.com

FORWARD THINKING. TRANSPORTATION.

TUESDAY

April 1, 2014

Demand Pictures: Trade Flows & Capacity Updates

8:45 am **Lessons and Insights from Norway and the Netherlands**
 Members interested in hearing the insights and lessons learned from the Mission to Norway and the Netherlands are invited to join Ruth, Lisa and Ross for an informal discussion of how different jurisdictions deal with issues such as the safe transport of energy and social license.
Ruth Sol, President, WESTAC
Lisa Baratta, Director, Strategy, WESTAC
Dr. Ross Danyluk, Executive Director, Strategic Policy Branch, Alberta Transportation

9:15 am **Annual Business Meeting**

9:40 am **Opening Remarks by the Chairman**
Hon. Steve Ashton, Minister of Infrastructure and Transportation, Government of Manitoba

GLOBAL DRIVERS AND COMMODITIES IN-DEPTH

9:50 am **Macroeconomic Context**
 Data suggests that we have returned to a period of positive economic growth. What's driving global trade? What is the economic capacity of developing countries?

Mining
 New mines are being developed across the region, including several mines in the North. What is the demand outlook for such commodities? Are the destinations for exports shifting? What are the implications for transportation?

Forecast:
Patricia Mohr, Vice President, Economics & Commodity Market Specialist, Scotiabank

Transportation Implications:
Scott Rudderham, Senior Vice President, Operations, Canpotex
Brad Johnston, General Manager, Logistics, Coal, Teck
Hon. Tom Beaulieu, Minister of Transportation, Government of the Northwest Territories

Roundtable discussion

11:30 am **Lunch with Speaker**
Understanding Trade Agreements and Canada's Trade Agenda
Colin Robertson, Senior Strategic Advisor, McKenna Long and Aldridge

TUESDAY [cont]

GLOBAL DRIVERS AND COMMODITIES IN-DEPTH (continued)

1:00 pm	<p>Agriculture</p> <p>Western Canada is one of the world's largest exporters of wheat and a leading supplier of other crops. Agricultural exports are more diversified than ever. What is the long-term demand outlook for these commodities? What particular challenges will exporters face in the coming years?</p> <p>Forecast: Milt Poirier, Partner, QGI Consulting Ltd.</p> <p>Transportation Implications: Ward Weisensel, Chief Operating Officer, CWB Murad Al-Katib, President & CEO, Alliance Grain Traders Jean-Jacques Ruest, Executive Vice President & Chief Marketing Officer, CN</p> <p>Roundtable discussion</p>
2:30 pm	Break
3:00 pm	<p>Energy</p> <p>The energy sector is poised for tremendous growth. New technologies are drastically improving recovery rates. The world is thirsty for our oil and natural gas. What is the demand outlook for these commodities? Can Canada compete internationally? What are the transportation challenges to meet the demand?</p> <p>Forecast: Dr. Wenran Jiang, Director, Canada-China Energy & Environment Forum</p> <p>Transportation Implications: Norm Rinne, Senior Director, Business Development, Kinder Morgan Rose Klukas, Economic Development Officer, District of Kitimat</p> <p>Roundtable discussion</p>
4:30 pm	Working Sessions end
5:00 pm	Reception
6:00 pm	Dinner

WEDNESDAY

April 2, 2014

7:30 am Buffet Breakfast

8:15 am Board of Directors Meeting

GLOBAL DRIVERS AND COMMODITIES IN-DEPTH (continued)9:00 am **Forest Products**

Exports of forest products – lumber, plywood, panels, logs, pulp and paper – are a key component of Western Canada's trade profile. Destinations for forest products are increasingly diversified. What is the demand outlook for forest products? What is the strength of the recovery in US housing starts? How will new trade deals impact export opportunities? Is the pine beetle crisis over?

Forecast:

Claire Huxtable, Analyst, ERA Forest Products Research

CONTAINERIZED TRADE9:20 am **Container Volumes**

Container traffic projections are strongly linked to GDP growth. Will this strong linkage continue in the future? What is the demand outlook for containerized imports and exports for Western Canada? What efficiencies are possible to enhance containerized trade? Will increased containerization of ag products and forest products continue? What are the growth opportunities for containerized exports?

Forecast:

Daniel Hackett, Principal, Hackett Associates

Transportation Implications:

John Salt, Senior Vice President, Supply Chain, Canadian Tire

Chris Woodward, Vice President & Managing Director, CRSA Logistics

Mark Hemmes, President, Quorum Corporation

Roundtable discussion

11:10 am Break

ROUND-UP ON CAPACITY**11:30 am Reaction from Transportation Service Providers**

After hearing in-depth forecasts of major commodities and containerized trade, Members will look broadly at the ability of the transportation supply chain to handle the projected demand. What infrastructure projects are coming online that will increase capacity? Where will the difficulties in meeting demand likely arise? What plans are in place for greater redundancy? What will be the impact of technology and innovation?

Key Contributors:

Don Krusel, President & CEO, Prince Rupert Port Authority

Robin Silvester, President & CEO, Port Metro Vancouver

Dean Wise, Vice President, Network Strategy, BNSF

Terence Bowles, President & CEO, The St. Lawrence Seaway Management Corp.

Roundtable discussion – all Members are encouraged to engage in a robust discussion regarding the forecasts and the implications for the transport system

1:00 pm Closing Buffet Lunch
