

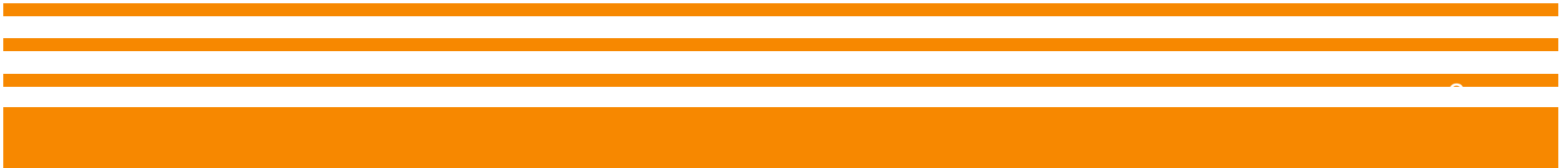
THE ST. LAWRENCE – GREAT LAKES TRADE GATEWAY



PRESENTATION TO IPANA – LAREDO, 2008-02-26 – Marc Gagnon, SODES

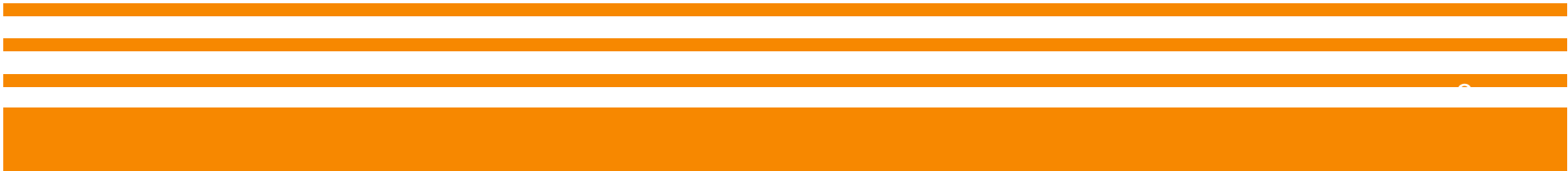
PLAN

- St. Lawrence – Great Lakes System
- Changes in World Trade
- SLGL Trade Gateway
 - Vision and Objectives
 - Leadership Council
 - 4 cargo groups
- Trends
- Examples
- Challenges



ST. LAWRENCE GREAT LAKES SYSTEM

Link between NAFTA and the North Atlantic

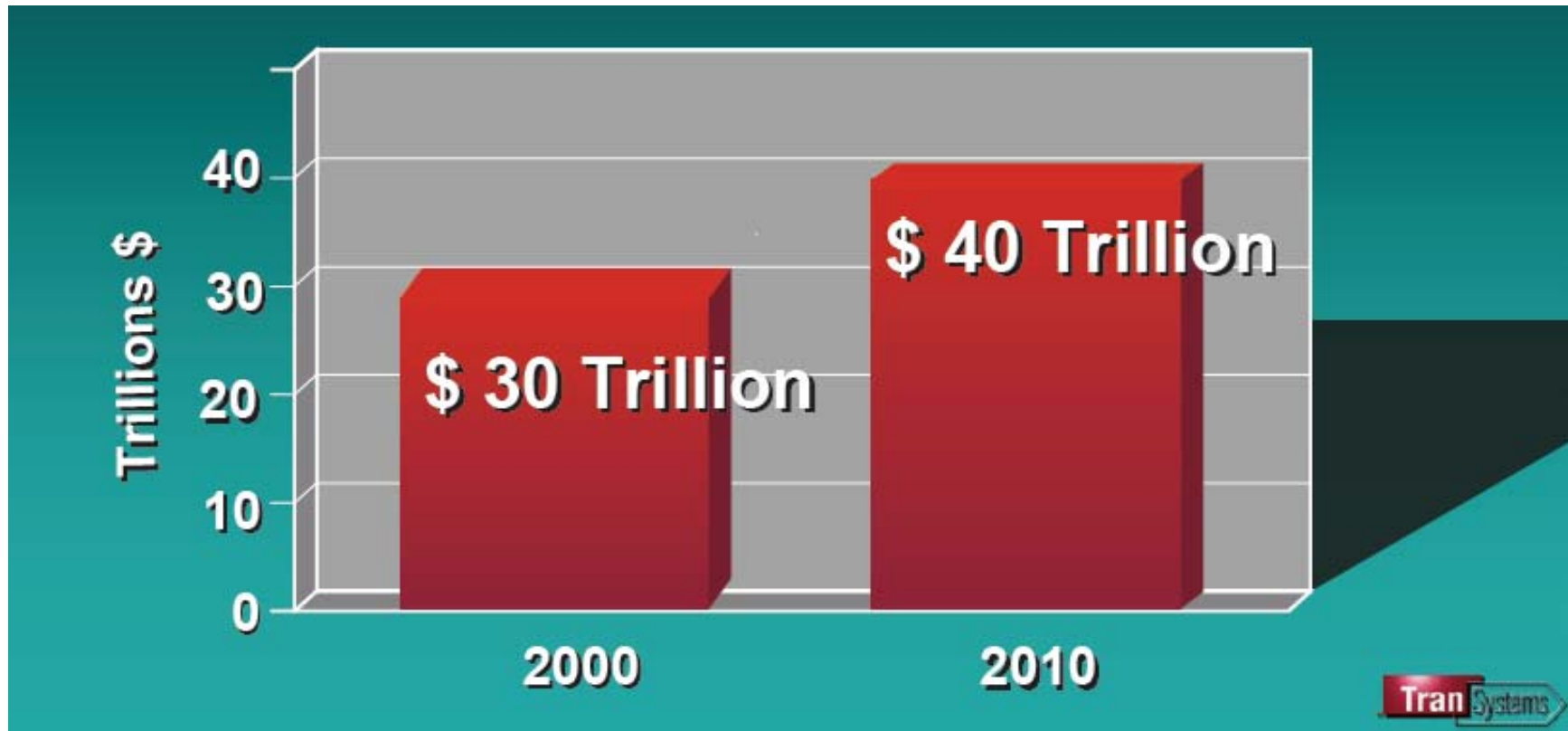


NEW CHALLENGES IN TRADE

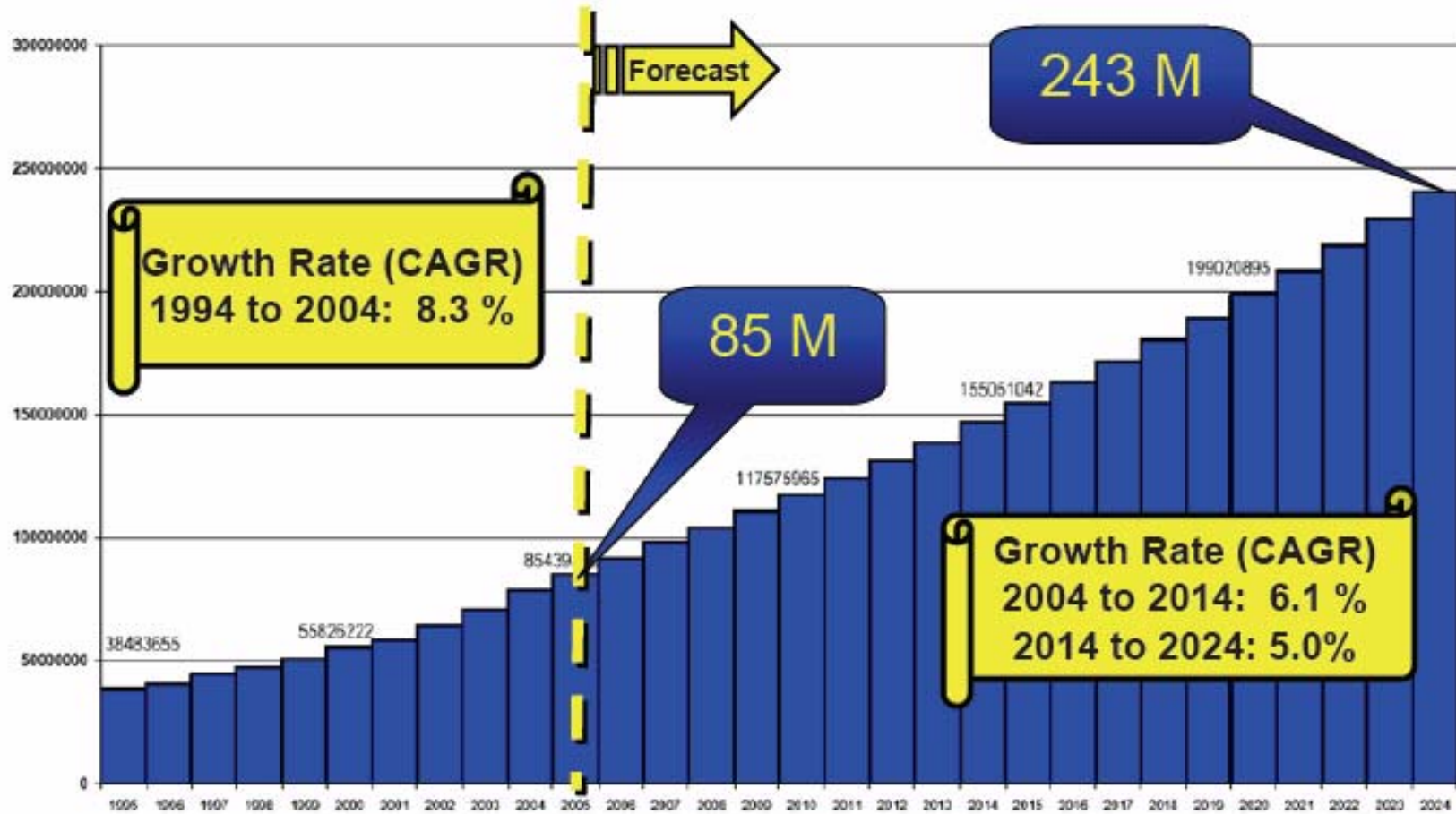
- STRONG GROWTH IN INTERNATIONAL COMMERCE
- CONTINENTAL ECONOMIC INTEGRATION
- CONTAINERIZATION
- INCREASE IN COMPETITION
- INFRASTRUCTURE
- REGULATORY FRAMEWORK
- THE ENVIRONMENT
- THE GROWING CHALLENGE OF SECURITY



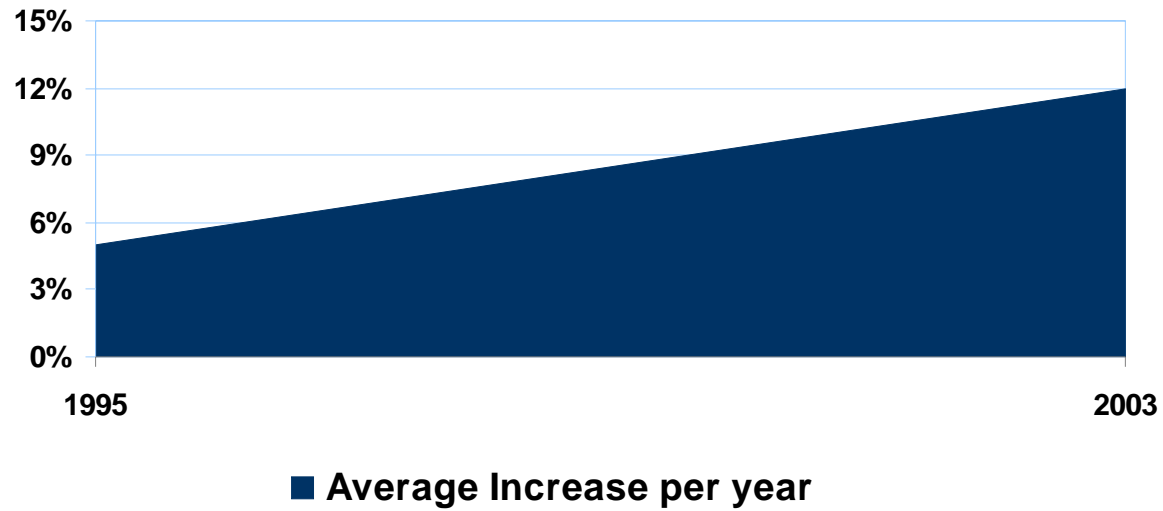
INCREASE IN WORLD PRODUCTION (WORLD BANK)



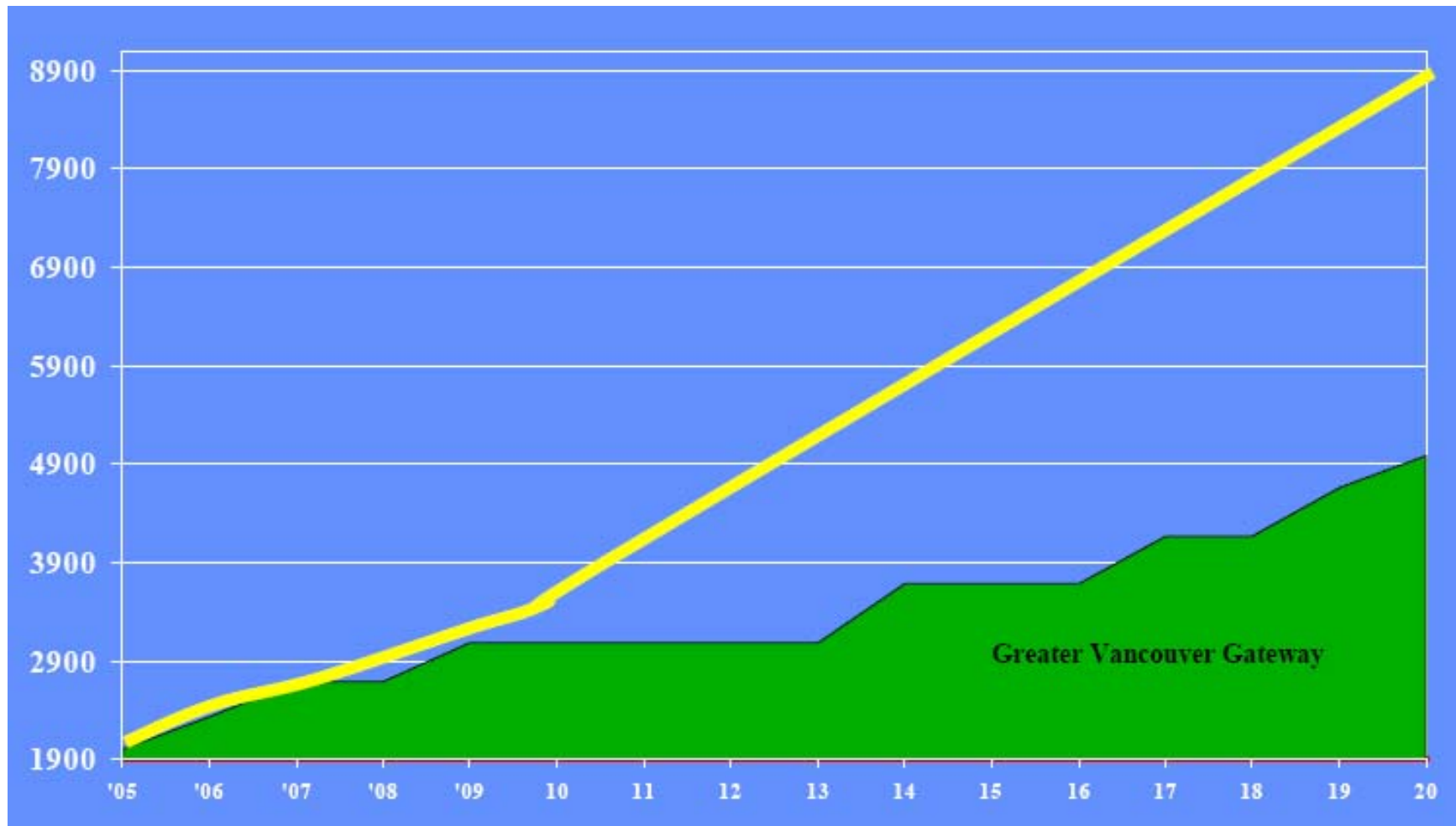
Trends in Containerized Cargo to 2024



IMPORTS IN NORTH AMERICA FROM ASIA



Demand vs. Capacity on Canada's West Coast



THE ST. LAWRENCE – GREAT LAKES TRADE GATEWAY



...A TRADE GATEWAY THAT DELIVERS

VISION

To become the most competitive gateway in northeastern North America in order to enhance the growth of international and domestic trade for the benefit of Quebec and Ontario's prosperity and sustainable development.



OBJECTIVES

To strategically position the St. Lawrence Great Lakes gateway in continental and world markets:

- To increase the competitiveness of the transportation network by investing in its infrastructure and services and ensuring an effective and efficient regulatory environment within the context of sustainable development;
 - To maximize the human and physical resources of the gateway;
 - To enhance the quality of life and prosperity of citizens in the St. Lawrence – Great Lakes' region through the development of an environmentally friendly, safe and secure transportation system.
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END RESULT

- Demand Analysis per cargo group;
 - Capacity Analysis;
 - Competitive Routings;
 - Key Supply Chains and bottlenecks (impact on trade);
 - Infrastructure (and regulatory) Action Plan.
-
- **In the end, the plan is to communicate an integrated set of investment and policy measures to strengthen Canada's competitive position in international commerce.**

LEADERSHIP COUNCIL - MEMBERS

MARINE

- *Canada Steamship Lines*
- *Fednav*
- *Seaway Marine Transport*
- *St. Lawrence Seaway Management Corporation*

RAIL

- *Canadian National*
- *Canadian Pacific Railway*

ROAD

- *Transport Robert*
- *Consolidated Fastfrate*

INTERMODAL

- *Logistec Corporation*
- *Montréal Port Authority*
- *Quebec Stevedoring Co.*
- *Thunder Bay Port Authority*

CARGO GROUPS

Containers

Chair: Maersk Canada

- Consumer goods
- Machinery & Parts
- Reefer
- Liquid Bulk & Bulk

Bulk

Chair: Fednav

- Grain
- Ore
- Coal
- Stone
- Salt

Liquid Bulk

Chair: IMTT – Québec

- Petroleum Products
- Chemical Products
- Edible Products

General Cargo

Chair: Novosteel

- Steel
 - Project Cargo
 - Forest Products
 - Aluminium
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-
-
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TRENDS - FACTORS

- Trade Outlook – Volume, Mix and Origin/Destination of Cargo
 - Gateway Options – Atlantic, Pacific, St. Lawrence / Great Lakes, Gulf of Mexico
 - Routing Options (Marine/Rail/Road)
 - Containerization or Not
 - Future of Short Sea Shipping?
 - Regulations
 - Environment and Climate Change
 - Community Acceptance of Growth
 - Labour Force Stability, Skills, Security, and Flexibility
 - Seamless Connections through Ports
 - Information Technology
 - Cooperative Planning
 - Infrastructure Capacity
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EXAMPLES

- **INFRASTRUCTURE**
 - Expansion of the Port of Montréal (containers)
 - Expansion of the Port of Québec (bulk)
 - Extension of the Season in the St. Lawrence Seaway
 - Dredging in the St. Lawrence River
 - Dredging in the Great Lakes
 - Rail Tunnel between Windsor and Detroit
- **SERVICE**
 - Labour Relations in Ports
 - Labour Shortage
- **REGULATORY FRAMEWORK**
 - CMA (Canada Marine Act)



CHALLENGES

- Inclusiveness, open-mindedness and transparency;
 - Ensure shipper involvement;
 - Action on existing bottlenecks should maintain momentum;
 - Reaching stakeholder consensus on issues, solutions and priority of actions;
 - Coordination with Continental Gateway and other gateway initiatives;
 - Results: Action Plan and execution of enhancements required, both infrastructure and regulatory.
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