FREIGHT TRANSPORTATION SYSTEM OF
SOUTHEAST ALBERTA

ASSESSMENT AND PLANS FOR GROWTH
Preface

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1. Executive Summary

Through their membership in the Palliser Economic Partnership (PEP), the City of Medicine Hat, Cypress County and the Town of Redcliff commissioned the Assessment of the Southeast (SE) Alberta (AB) Transportation System. The work documented the current system and identified the proposed future Highway #1 Bypass. The work also interviewed 24 organizations to identify the sector’s impact on the regional economy, ascertain potential new improvements to the system and the work developed a future vision for the system.

From an economic impact perspective, the SE AB Transportation System is very important to the regional economy. Over 40,000 truck and rail goods movement trips were identified in the survey. Fifteen organizations surveyed in the region provided employment data; and 1,643 jobs were identified as being directly dependent on the transportation system.

With respect to new improvements to the system, the company surveys identified sixteen potential improvements. All of which have been discussed and presented to the PEP members involved in the study. As a sample, interviewees recommended the formation of an Industry Lead Advocacy Group. Several of which were interested in joining. Additionally, more land with rail to site is needed in the region to accommodate future growth.

The study also documented a future vision for the SE AB Transportation System. The vision will include a HWY #1 bypass and free flowing traffic east to west. Validated by the survey results, commercial processing and extended hours of operation at Wild Horse, and new transload facilities should be included in the vision. A regional intermodal facility is less likely as the local volume of containers to support rail involvement has yet to be identified.

These new infrastructure improvements should be considered in a planning exercise that will focus on protecting job creation nodes, engaging industry and finding locations in the region ideal for this future industrial growth to occur. The study suggests that areas where the Canadian Pacific Railway’s (CPR) lines meet major road infrastructure like the proposed bypass are ideal for future growth sites.

In summary, each jurisdiction involved in the project is better prepared to engage in the attraction of goods movement companies, and the study provides a plan to achieve future growth, and the vision. The study provides knowledge on how companies in the region currently use the transportation system, educational information on the goods movement sector, etc. As an initial step the jurisdictions should approach PEP to explore options on how to complete all or some of the actions in the plan (i.e. identify synergies).
2. Project Understanding

Through their membership in the Palliser Economic Partnership (PEP), the City of Medicine Hat, Cypress County and the Town of Redcliff want to develop an action plan within the transportation sector. Prior to the development of an action plan and recommendations, they require an assessment of the strategic significance of transportation to the local economies and employment as well as identification of future growth opportunities in the transportation sector.

The project will include the identification of factors that inhibit advancement of the sector, the identification of key messages for investment attraction and the development of a Lead Generation approach. Lastly, this work will identify potential future freight system improvements. In summary, the work will include:

a) Examination of what is;
b) Vision of what might be;
c) Business plan including action plan to achieve the vision;
d) Relevant investment attraction opportunities.

The purpose of this report is to present the findings of the study. This report will cover topics like current infrastructure, interview results (32 in total), the development of list of freight/goods movement deficiencies, and a business plan to achieve the future state. This report also includes a list of opportunities for attracting new investment and a business plan to achieve the future vision.

3. Method

The intent of the study is to assess the southeast Alberta goods movement infrastructure and identity growth opportunities. To that end the majority of the data gathering focused on interviewing the current users of the infrastructure. Three techniques are deployed. They are:

1. Canadian Pacific Railway (CPR) provided a list of key commodities and sectors to focus on in the region for growth opportunities (refer to Page 17). A list of their transloads and intermodal terminals were also developed from information on line.
2. Site Tours of logistics clusters in Calgary, Medicine Hat, Redcliff and Dunmore were completed to identify potential commodities and industry players for a top interview company list.
3. A survey was conducted of 24 organizations, all having a distribution function, or future interest in the region. This enables the development of factors that influence
the customer’s decision to locate in a region, identify rail and road traffic, and infrastructure deficiencies.

Three different types of new infrastructure were tested for use with the interviewed companies. They are:

- An improved border crossing at Wild Horse (e.g. longer hours of operation), south of the region for additional access to Montana and points beyond in the US;
- New Transload facilities, and commodity was not specified;
- A new Intermodal (IMS) terminal.

The interview process also allowed for future infrastructure recommendations that were not listed on the survey. These improvements are presented in the Future State section of this report.

4. Infrastructure Research Results

Site tours, internet research, interviews with local planners, initial interviews with CPR and the Province were deployed to identify the infrastructure of the current Southeast (SE) Alberta (AB) Transportation System. Proposed future state infrastructure was also identified. As an example, ten trucking companies have operations in the region, and five transloads are operating in the region. Over 40 companies in the manufacturing, agriculture and the energy industry were identified as having a dependence on the SE AB Transportation System.

Current State of the Freight Transportation System

The purpose of a freight or goods movement transportation system is to support industry in a region. It enables product to flow to market for a transaction to be completed. Therefore an assessment of a region’s economy can help assess how well a region’s transportation system is functioning. In other words, if a transportation system is at capacity, it will constrain economic growth. This is true for a region as well as on a world scale.

If infrastructure investment is a continuum, then China from an international perspective is known for heavy investment in infrastructure. India and Brazil are on the other end of the continuum where their road, rail and airport infrastructure is known to be at capacity and causing issues with their economy. Where is the Medicine Hat region on this continuum? From a macro level, the SE AB Transportation System appears to be functioning well enough to support the local economy.
From an economic health perspective, the Medicine Hat Regional unemployment rate, as of November 2013, is 2.2%\(^1\). This is below a 5% full employment rate. This statistic suggests that the region’s economy is very healthy. This infers that the current transportation system is working well enough to support local industry. It suggests that labour is a constraint on economic growth, before the transportation network can get to capacity.

A region’s competitiveness, or its ability to attract investment, is dependent on the performance and reach of its transportation system too. Companies require close proximity to source materials and close proximity to delivery points (i.e. their customers), or transportation costs can make them less profitable, less competitive.

Several companies like Methanex, Cancarb, CFIndustries, etc. are in the region and source product, or ship to their customers all over North America and all over the world. This validates that for certain commodities the reach of the SE AB Transportation System is sufficient to support business.

Two significant investment related stories were identified during the research. The first is the proposed Methanex $1 billion expansion, “production from a new plant would be destined overseas, specifically China.”\(^2\) This story suggests the regional transportation system has significant reach, and validates the importance of local rail infrastructure. Methanex gets the majority of their product to market by rail. The importance of the region’s connection to the coast is also validated. Methanex uses Port Metro Vancouver after rail. Lastly, the Methanex example validates growth potential for the regional economy. This suggests a healthy economy and a healthy transportation system.

The second investment attraction case is the closure of Halliburton’s Medicine Hat Field Office. Approximately 200 employees were relocated to Regina, “The Medicine Hat facility includes several of Halliburton’s business lines that support our customers’ business activity, which, over the past several years, has been more focused in the Bakken area of southeast Saskatchewan and southwest Manitoba.”\(^3\) Though this story is about office personnel and not as much goods movement, it suggests that a region can be too far away from activity, affecting transportation costs, and not remain competitive.

One conclusion that can be made from this small sample is that every company’s need for proximity to source material and delivery points varies. The related cost impacts are very

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specific to customer contracts, sector, region serviced from a location, etc. A region that works for one company may not work for another. A significant shift in activity in an industry can make a location no longer viable for a company. The locational motivation factors for a company can be very different for each industry. For example, in the Methanex business case, being close to source products like water and natural gas can significantly motivate where they locate. Once there, costs to moving a plant and rail infrastructure are very significant. In the energy sector the “last mile” logistics model is used a lot, so a very close proximity to field operations is required.4

The above samples connect the SE AB Transportation System to regional investment, and speak to the system’s performance. Next we will look at the impact a local company has on the economy to further validate the importance of the transportation system, and its connection to the local economy.

RedHat Co-operative Ltd., located in Redcliff, is a significant operation onto itself. It has 135 (low season) – 215 (peak period) full time employees during the year. This suggests an average of 175 full time equivalent (FTE) employees. It has hundreds of trucks coming and going each year, which some fuel locally and their drivers eat at local restaurants, etc. From a grocery industry perspective, it puts the region on the map. It is a top supplier to companies like Loblaws.

Economic impact models for the transportation and logistics sector typically stop there and do not give the sector the credit for the business it enables - perhaps because it is difficult to measure. This 95,500 SF building in Redcliff, which is very dependent on the SE AB Transportation System, supports 52 local greenhouse growers and enables $60 million in annual sales of local produce. This accounts for an additional 600 FTEs. In total 775 FTEs are dependent on this location and the SE AB Transportation System.

If this process was continued for the rest of the agricultural and food industry, the local energy and manufacturing sector, one can quickly conclude that the local economy is very dependent on the SE AB Transportation System. The examples with Methanex and Halliburton show that its future growth potential is link to the transportation system too, and the region’s proximity to both source material and delivery points are fundamental.

This macro-economic review of the region validates that the regional transportation system is functioning well enough to support the local economy, as the local economy is healthy and growing. There are several regional examples where the reach of the system is international. It also concludes that at this time, labour is more likely a constraint on the

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4 Note: Not suggesting that Energy Services Companies are leaving the region. Schlumberger Canada, Sanjel Corporation are just a few examples of companies still active in the area.
economy, not the transportation infrastructure. The Halliburton example was given to illustrate how a shift in the location of industry activity, changing transportation costs, can trigger a re-evaluation of location.

Next the report will present a more detailed assessment, and document the current state of each mode within the SE AB Transportation system.

**Canadian Pacific Railway’s Current State**

Rail is a very important mode of transportation for regions located inland in western Canada. It is the connection to the west coast ports, and the lowest cost mode. It provides the greatest reach to market and for sourcing. As one regional interviewee put it, “I can rail my product from Wisconsin for the same price I can truck it from Edmonton.” From a road network perspective, Edmonton is 535 km away, and Wisconsin is 2050 km away. In this example the product travels 3.83 times further on rail.

Canadian Pacific Railway’s (CPR’s) mainline travels through the region, to Vancouver in the west and Toronto and beyond in the east. It is typically in close proximity to TransCanada HWY 1. It does swing into the downtown core where the main yard is located. The rail activity onto itself has a significant economic impact, as CPR has approximately 325 employees in the region.

CPR’s current strategy is cost cutting, as appose to capital expansion. This is important to note from a future state strategy perspective. CPR, like many private companies, requires a very positive business case for justifying new infrastructure in a region.

An example of this cost cutting is the 2013 job eliminations, “part of that cost-cutting will come in the form of layoffs, with CP Rail management saying it plans to eliminate 4,500 jobs by 2016. As of March 31, 2013, CP Rail said it had already cut about 3,400 positions.”

A second example of CPR’s cost cutting strategy is the closure of their intermodal facility in Saskatoon, SK. Research did not yield an exact answer to the closure, but one can assume that it was due to not having enough local traffic to support the expected profitability for the facility. Canadian National Railway (CN) also operates an intermodal terminal in Saskatoon - which is still open. Perhaps a city of 260,600 people can only support one intermodal terminal.

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5 Anonymous interviewee, Medicine Hat, October 2013.
On a regional level, CPR has a large yard in downtown Medicine Hat. There are also significant industrial clusters in the Brier Park, Redcliff and Dunmore area. These areas will be discussed more in the mapping section of this report. There are additional lines in the region that will be highlighted later.

Unfortunately research did not yield where the Yard Switching Limits are in the region. These are important as companies located within the “Yard Switching Limits”, qualify to receive 24/7 scheduled railway yard switching crews.

Research did however yield that the significant grade elevation changes in the region negatively affect rail operations, and add additional costs to the local switching and train movement in general.

CPR’s mainline is in the region. Mainline traffic takes priority over local switching, like for any railroad in any region (i.e. local traffic cannot impact the national economy). New development cannot create local switching that will block the mainline. This is important to understand for future planning.

**Intermodal (IMS)**

Currently there is no intermodal (IMS) terminal in the region (used to put containers on and off the rail chassis to a truck chassis). All intermodal container shipments in the region travel to and from the Calgary region. A shipper in the region can use CPR’s terminal in the southeast of Calgary (274 km), or CN’s terminal in Conrich, AB (280 km). These locations are advantageous for Medicine Hat as they are both on the east side of Calgary with good access and egress to the TransCanada HWY 1.

Western Canada IMS service is important to understand. The Calgary region is a significant inland port. The portion of Calgary container traffic that is SE AB regional traffic is currently unknown. The study attempts to quantify SE AB container traffic in the survey.

The west coast ports are a source for the majority of containers in the region. Asian imports are a dominant flow in the west. Figure 1 illustrates the volumes for the west coast ports, yearend 2011.
Figure 1: West Coast Port TEUs circa 2011

410,469 TEU’s for Prince Rupert Port Authority in 2011.


Figure 2 illustrates the locations of all the inland IMS terminals in western Canada. Figure 3 also provides additional information for each terminal location, including if both CPR and CN serve a location, and the populations of each location.

Figure 2: Western Canada Inland IMS Terminal Locations
Figure 3: Inland Terminal Cities, Providers and Populations

<table>
<thead>
<tr>
<th>City</th>
<th>Population</th>
<th>IMS Yard</th>
<th>Port</th>
<th>TEU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vancouver</td>
<td>2,313,328</td>
<td>CN and CP</td>
<td>Yes</td>
<td>2,507,032</td>
</tr>
<tr>
<td>Prince Rupert</td>
<td>12,508</td>
<td>CN</td>
<td>Yes</td>
<td>410,469</td>
</tr>
<tr>
<td>Edmonton</td>
<td>1,159,869</td>
<td>CN and CP</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Calgary</td>
<td>1,214,839</td>
<td>CN and CP</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Regina</td>
<td>210,556</td>
<td>CP</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Saskatoon</td>
<td>260,600</td>
<td>CN</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Winnipeg</td>
<td>730,018</td>
<td>CN and CP</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

The first conclusion that can be drawn from Figure 2 is that the terminals are located far from each other. A second conclusion (Figure 3) is no inland terminal is located in a place with a population under 200,000.

To quantify the demand required to justify an inland IMS terminal; in 2003 ProLog Canada conducted a containerization study of the Peace Region in northern Alberta. It is located further away from Edmonton than Medicine Hat is located from Calgary. The study identified 5,400 containers a year that would "most likely" use an Intermodal facility in the Grande Prairie area.9 The Peace Region does not have an IMS terminal, as this is not enough traffic to justify investment for a railroad.

Figure 4: Container Picker at CN Calgary Terminal

The distance from the region to Calgary does create impedance on local freight movement. A future intermodal facility is tested in the study, but it is a long-term development. As

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stated, there is a cost cutting strategy at CPR and the current size of the region (population of the City of Medicine Hat 61,180)\textsuperscript{10} is not likely to support a facility. That being said, quantifying the size of the current local container market will help with future planning efforts.

The resistance on freight movement can be measured in cost and time. The approximate 600 km round-trip from Calgary to the region takes about five hours and twenty minutes over the road. Rail IMS service would be slower. From an IMS cost perspective, two routes were tested on CN’s website. The results are in the figure below.

The first route that was tested is a typical sourcing route for the west. Toronto is the origin and Calgary, and then Medicine Hat is the destination. This route uses a 53’ domestic container. The second route is a typical export to market route for the west. Calgary and Medicine Hat are the origins for the lanes, and Vancouver is the destination. This lane uses a 40’ marine container, which is used on international container vessels. The vessel portion of a trip to Asia is not included in the price.

\textbf{Figure 5: IMS Rates for Calgary Compared to Medicine Hat for Vancouver and Toronto}\textsuperscript{11}

<table>
<thead>
<tr>
<th>Origin</th>
<th>Destination</th>
<th>Rate</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toronto</td>
<td>Calgary</td>
<td>$3,534</td>
<td>53’ Dry Container</td>
</tr>
<tr>
<td>Toronto</td>
<td>Medicine Hat</td>
<td>$4,013</td>
<td>53’ Dry Container</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$479</td>
<td>Difference</td>
</tr>
<tr>
<td>Calgary</td>
<td>Vancouver</td>
<td>$2,487</td>
<td>40’ Dry Container</td>
</tr>
<tr>
<td>Medicine Hat</td>
<td>Vancouver</td>
<td>$2,966</td>
<td>40’ Dry Container</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$479</td>
<td>Difference</td>
</tr>
</tbody>
</table>

The additional cost for the region is the cost for Calgary subtracted from the cost for Medicine Hat. For both lanes tested, for IMS, the additional cost is $479.

It is important to note that a future IMS terminal in the region would need significant volume to decrease the $479 cost, let alone justify the capital investment. Truck is much faster than rail too. So this potential cost savings will come at a much slower travel time to Calgary. This increased travel time will also impact the customer’s decision to use the service.

Transload

Local transload infrastructure is important for moving freight from rail cars to trucks. There are several differences between the Transload service and Intermodal. First is that the product has to be physically removed from the rail car (refer to Figure 6). Second, both rail companies and other private companies develop and operate transload facilities. These transload facilities are very commodity specific. For example racks and tanks are needed to handle petroleum products, and conveyor or vacuums and silos are needed to handle fracing sand. Below is a list of products typically handled by transload facilities:

- Petroleum – Retail and Industrial
- Metals – Pipe for Energy Sector
- Dry bulk - Portland Cement (Housing, Energy Sector), Fracing Sand (Energy Sector)
- CO2 (Energy Sector)
- Lumber and OSB
- Plastics

Figure 6: Example of Transloading with Portable Conveyer
Interviews identified several private transload sites in the SE AB region:

1. Trican Well Services Corporation (commodities: sand) - Redcliff;
2. Unimin Corporation (commodities: sand) - Medicine Hat;
3. TORQ Transloading Inc. (commodities: crude) – Tilley;
4. Iron Horse (commodities: feed products, fertilizer, frac sand, dangerous goods, flat bed cars), 35 km west of Medicine Hat on Highway 3.
5. TransMark Ltd. (commodities: barley, corn, DDG’s, wheat screenings, soya meal, pellets, and oversize loads for projects like wind turbines) - Lethbridge.

Note that all the above transload operations are not owned and operated by CPR, even though they are all located on CPR lines.

There are several other rail to site locations in the region. These other sites are reserved for the owner’s product only, so they are not classified as a transload facility.

Below is a list of CPR served transload facilities in the Calgary region:

1. Alyth TFR (Transload)
   6380 Ogdendale Rd SE
   Ownership CP facility

2. Target Transload Systems Inc. (Transload)
   3016 58 Ave S.E.
   Ownership Private facility

3. Vedder Transport Ltd. (Transload)
   5308 36th St SE
   Ownership Private facility

4. Calgary TFR (Transload)
   6380 Ogdendale Road S.E.
   Ownership CP facility

5. Ogden TFR (Transload)
   7260 Ogdendale Road S.E.
   Ownership CP facility

6. Docktor Freight Solutions Corp (Transload)
   4507-8A Street NE
   Ownership Private facility

**Major Highways in the Region**

Several highways in the region provide access and egress in multiple directions. The region is located on the TransCanada Highway #1. Highway #3 and Highway #1 intersect in the City of Medicine Hat. Goods move through the region via the Crowsnest Highway #3 to Lethbridge and the TransCanada HWY #1 to Calgary. The United States is accessible via Highway #41 at the Port of Wild Horse. Highways #41 and #36 provide access to the oil sands region in northern Alberta.”
City Bypass Road

Alberta Transportation has conducted a functional planning study of the Highway 1 and 3 corridors in the region. The proposed alignment is available. This new road will bypass the City of Medicine Hat and will dramatically impact future goods movement in the region. The road will allow east-west free flow traffic.

In many other regions, when a new ring road or bypass is constructed, new logistics development occurs. It usually results in new land available with rail to site infrastructure and with great highway access and egress. Having access to both modes at the same site is ideal for industrial development. This situation has worked in the past for the SE AB region too. Brier Park is a great example (refer to Figure 7).

Medicine Hat Regional Airport YXH

Scheduled service at YXH offered by mainline carriers has been to Calgary and provided by Air Canada with approximately twenty-five flights per week since 2004. Since the fall of 2012, Air Georgian has been operating the service with flights four times daily on weekdays, two times daily on Saturdays and three times daily on Sundays. They use an 18-seat Beech 1900 aircraft.

Many stakeholders in the community see the 5,000 foot runway at YXH as an obstacle for attracting new air service to the region. As the runway is too short for jets which would typically be used on the more distant routes. A study concluded that the runway length is sufficient to attract flights using the DHC-8-Q400 turboprop aircraft (Q400). This is the aircraft used by “Encore”, the new regional affiliate of WestJet, which will start in mid-2013.

The current terminal capacity is inadequate to accommodate 78 maximum passengers need for Q400 flights. Terminal building expansion is underway. The expansion project is valued at $5.3 million and is scheduled for completion by the spring of 2015.

Cargo does travel on domestic passenger flights. As such there is a connection to goods movement from the current and potential new air passenger service for the region. Research did not yield the amount of cargo tonnage loaded and unloaded at YXH.

How Sectors Move Freight

Initial interviews were completed with CPR and Innovation and Advanced Education to determine the rail lines of business that were in the region now and the ones with potential future grow:

- Grain,

• Sulphur and Fertilizer,
• Industrial and Consumer products.

It was suggested that the focus of this study should include opportunities that require direct rail to site and transload. Though it was suggested that intermodal was not significant in the region, the other lines of businesses represent 70% of CPR’s revenue. The above list was validated with research and interviews.

Sectors like manufacturing, energy and agriculture all have companies in the region dependent on rail. For example companies like Methanex, CFIndustries, Richardson Pioneer, Parrish & Heimbecker, and Trican Well Services Corporation are all dependent on rail to operate in the region. Additionally, all five transloads in the region along with their customers are dependent on rail.

The road network is also very important for the regional economy. All the companies above use the road network. For Richardson Pioneer, their source product is trucked from local farms, where they store it in a silo, then load trains in access of 100 cars (unit trains), that travel via rail to the port for export.

Within the manufacturing sector, both Methanex and CFIndustries do customer deliveries within a 600 km\(^{13}\) radius of their facility with truck. Companies like Goodyear do almost all their customer deliveries and sourcing with truck. They do some rubber sourcing with intermodal, and are testing intermodal customer shipments, but for the most part trucking is their main mode of delivery.

Source Energy is very dependent on the road network and trucking. Their entire inbound and outbound product currently uses truck because they do not have rail to site yet. Energy service companies like Calfrac are dependent on Source Energy, and transloads like Unimin Corporation, as they use fracing sand.

Sectors like value added food and value added agriculture are road dependent too. Companies like RedHat Co-operative Ltd. and Landmark Feeds Inc. use mostly trucking. RedHat Co-operative Ltd. also uses some airfreight inbound, that is offload at YYC (Calgary Airport) and trucked to the region. They also use a little IMS, but again the majority of their product uses trucks, including the source deliveries from local green houses. Landmark Feeds Inc. delivers as far away as points in BC with truck from the region.

\(^{13}\) Approximate delivery radius, varies.
NaturEner’s wind farm construction in the southeast of the region will use transload for the delivery of its product to its future site. Dimensional loads such as oversize windmill blades will be railed into the region, and then trucked to the construction site.

As the rail, road, transload and intermodal infrastructure can impact all sectors, as seen above, these systems and their points of intersection need to be planned well and protected for the economy to function.

**Mapping of the SE Alberta Transportation System**

Maps describing the regional transportation infrastructure are presented in this next section. The section also includes information on use and how the infrastructure interconnects.

**Rail Network**

The local rail service area (Figures 7, 8 & 9) and road network (Figures 10, 11, &12) that supports the regional economy is presented next.

Rail atlas maps from Canadian National Railways’ website\(^{14}\) are below. For scale visibility, three screen shots are provided. Figures 7, 8 & 9 move west to east in the region.

**Figure 7: Western Regional Rail Service Area (Redcliff and Medicine Hat)**

![Western Regional Rail Service Area (Redcliff and Medicine Hat)](image)

Figure 7 above presents the rail infrastructure in the west of the region. Two clusters of significant track infrastructure are highlighted in red. Many large industrial employers in the region are located around this infrastructure (e.g. Methanex, CFIndustries, Cancarb, and

\(^{14}\) Source: [http://cnebusiness.geomapguide.ca/](http://cnebusiness.geomapguide.ca/).
Goodyear). In Redcliff, just east of the lower red circle and on the south side of the TransCanada HWY1, there are also smaller operations from a rail perspective, but significant to the local economy. This includes Trican Well Services Corporation’s operation.

Figure 8 illustrates the main yard of CPR in the downtown core. The main conclusion from this figure is that the yard is large in size and probably handles a lot of traffic. Also note that there is only one shipper highlighted on the figure in close proximately to the yard.

**Figure 8: CPR Main Yard (Downtown Medicine Hat)**
Figure 9 illustrates the eastern regional rail infrastructure. There are two clusters to note in the circle, one on the south side of the mainline, just east of Dunmore where major shippers like Richardson Pioneer are located. There is also another piece of track infrastructure north of the mainline with shippers like Paterson Grain.

**Figure 9: Eastern Regional Rail Service Area (Cypress County)**
Road Network

Figure 10 illustrates the regional road network well. HWY #36 and HWY #41 north are visible in the figure; both reach to the oil sands in the north (highlighted in red). In blue is HWY #41 south which is the region’s connection with the United States via the Port of Wild Horse. The border crossing does not operate 24/7 (close at 21:00 April 29 to October 31, and at 17:00 November 1 to March 31)\(^{15}\); as such the majority of commercial traffic for the region uses other ports of entry. Highway #3 (yellow), heading southeast from the city, provides access to Lethbridge, HWY 2, Port of Coutts, and Crowsnest.

Figure 10: Regional Road Network

The Province of Alberta has proposed a TransCanada Highway #1 bypass in the Medicine Hat region, and it is illustrated in Figure 11 (green line). The current alignment of TransCanada Highway #1 is the black line that cuts through the city at an angle. Highway #3 is also highlighted in green heading southeast from the city. It provides access to Lethbridge. At the eastern end of the figure, noted in the purple circle, Hwy 41 and 41A merge, north of TransCanada Highway #1.

\(^{15}\) Source: [http://www.cbsa-asfc.gc.ca/contact/listing/offices/office659-e.html](http://www.cbsa-asfc.gc.ca/contact/listing/offices/office659-e.html), January 5, 2014.
Figure 11: Future Bypass Alignment\textsuperscript{16}

\textsuperscript{16} Stantec, Prepared For: Alberta Transportation, Proposed Alignment Map (For Discussion Purposes Only), Draft November 2007. Provided by the City of Medicine Hat.
The bypass will provide new opportunities for investment and lands with both rail to site potential and great road access and egress. A great example of that is between the 2nd and 3rd (HWY #3) interchange on the bypass from the east. The CPR line to Lethbridge is also highlighted on the map between these two points. This could develop into a future industrial cluster. Similar opportunities could occur where the bypass first begins in the east and the west as CPR’s mainline is located close. The current alignment of TransCanada Highway #1 will also provide great road access and egress. Local planning should consider protecting these areas for future industrial development and employment creation nodes.

**Provincial High Load Corridor**

Hwy #36 is used as part of the Provincial High Load Corridor System, and the region has excellent access to it via TransCanada Highway #1. Unfortunately this route is not highlighted on the Provincial Corridor Map (refer to Figure 12). The dotted blue line would be a good addition to the map for the region, if the infrastructure supports the addition. It would assist in the region’s ability to attract potential future module construction work for the energy sector.

**Figure 12: Provincial High Load Corridor Map**

The current state of the SE AB Transportation System is now well documented. The next section of the report will ask its users how it currently performs and what improvements can be made.

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17 Source: [http://www.transportation.alberta.ca/Content/docType329/Production/2013_HIGH_LOAD_CORRIDORS.pdf](http://www.transportation.alberta.ca/Content/docType329/Production/2013_HIGH_LOAD_CORRIDORS.pdf), January 5, 2014.
might assist with investment attraction. The future vision of what might be is also tested with the local users of the system.

5. Interview Results

The interview results include information from 28 interviews, and information from the three stakeholder jurisdictions. The interviews were conducted from late September until March 2014.

Survey results were very productive. For example, the study resulted in garnering press attention for the Palliser Economic Partnership (PEP). People were also identified to both champion potential advocacy efforts, and to engage as a potential PEP board member. Companies provided information on the current state of the transportation system and what “might be”, including actions to achieve the vision.

Thirteen companies also provided detailed traffic information. The figure below identifies the annual shipping traffic included in the study.

**Figure 13: Annual Shipping Movements in the Survey**

<table>
<thead>
<tr>
<th># Of Companies</th>
<th>Truck Movements</th>
<th>Rail Movements</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>31,618</td>
<td>12,630</td>
</tr>
</tbody>
</table>

The volumes above support the fact that the region is very dependent on transportation for its economic prosperity. Note that this is a sample of local shippers so it is a fraction of the full impact of the sector in the region. Secondly, seven of the thirteen companies that provided shipping data only provided it for one direction, so their volume could in fact double and increase the results. Again imaging the impact of the system if the economic models gave it credit for the sale of the goods being transported in the movements in Figure 13.

The interview results helped define the economic impact the transportation system has on direct employment in the region. Of the 24\(^1\) organizations interviewed, research and interviews yielded employment numbers for 15. A total of 1,643 jobs in the region are directly dependent on the transportation system.

The interviews garnered several ideas to improve the local goods movement system. The next section in this report will focus on areas of potential improvement and the future

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\(^{1}\) Note that multiple interviews were held with some organizations.
vision (i.e. improved border crossing at Wild Horse, new Transload terminals, and a new IMS terminal tested with the surveys).

**Areas of Potential Action**

Below are the survey findings for transportation infrastructure. Each potential improvement topic has the number of companies that mentioned it. Some topics are national and provincial in scope, and not just a regional issue. Many of the potential improvements are very complex; with multiple stakeholders and potential unintended consequences associated with possible solutions. With that we present all the areas of potential action identified, but understand that these are put forth for discussion purposes, and need additional study.

Many of these ideas require additional research to validate the magnitude of local impact, possible solutions, etc. The sample size for this study is 24 organizations. Any improvement with more than two companies identifying it has a response rate greater than 10%, which typically suggests significance. All the improvements were not pre-identified on the questionnaire and raised in meetings without other companies present.

Theoretically, all bottlenecks are seen as a deficiency from a transportation system perspective. As one trucking company explained, “the faster and more efficient my trucks move, the cheaper my rates can be.” Anything that reduces the flow of goods can impact an area’s competitiveness.

A meeting was held with the three municipalities to provide feedback and initial prioritization of the areas of potential action. Attendees included economic development and planning resources in the region. Priority “A” items are near term in timing and have connections to the mandates of the three jurisdictions or PEP. Priority “B” items are longer-term timing, and have scopes beyond that of the jurisdictions and PEP. The results are in Figure 14.

**Figure 14: Areas of Potential Action**

<table>
<thead>
<tr>
<th>AREAS OF POTENTIAL ACTION</th>
<th>COMMENTS</th>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PEOPLE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1. Industry Lead Advocacy Group.</strong> Five companies agreed that the region could use a group of transportation related industry members to respond to and identify local goods movement issues.</td>
<td><strong>Determine what jurisdictions can do to initiate and support.</strong></td>
<td><strong>A+</strong></td>
<td></td>
</tr>
</tbody>
</table>
## ROADS

<p>| | | | |</p>
<table>
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<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>2. <strong>Free Flowing Traffic on TransCanada HWY 1 in Medicine Hat Region.</strong> Two companies mentioned that there is a need to remove all lights on TransCanada HWY 1 in the Medicine Hat region. The Provincial plans for a bypass validate the above idea. The planning groups in the region are addressing this action. Information sessions with a future industry group will help with communication and status updates.</td>
<td>Jurisdictions to Communication With Industry via group in Action #1.</td>
<td></td>
<td>B</td>
</tr>
<tr>
<td>3. <strong>Universal Weight Restrictions for Trucks in AB and Saskatchewan.</strong> One company mentioned this issue. Organizations like the New West Partnership(^{19}) attempt to address these issues.</td>
<td>Determine if Jurisdictions and PEP Can Assist.</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>4. <strong>Box Springs Road NW and Broadway Ave intersection.</strong> Two companies mention this improvement. Trucks heading south have difficulty pulling out from stop on a fast road on a turn(^{20}).</td>
<td>City Addressing.</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>5. <strong>Rail Crossings in Brier Park.</strong> Four companies mentioned this improvement. Two mentioned that the rail company should be able to blow a whistle in an industrial area to help with the issue(^{21}).</td>
<td>City to Communicate Traffic Impact Study Completed via group in Action #1.</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>6. <strong>Intersection at Dunmore Coop (Eagle Butte Road HWY #1).</strong> One company mentioned a need for improvement of this intersection. Specific solutions were not mentioned.</td>
<td>Cypress County is working with AB Transportation for solution.</td>
<td></td>
<td>A</td>
</tr>
<tr>
<td>7. <strong>Overpass at HWY 41 Needs Investment (HWY 1).</strong> One company mentioned a need for improvement of this interchange. Specific solutions were not mentioned.</td>
<td>Cypress County is working with AB Transportation for solution.</td>
<td></td>
<td>A</td>
</tr>
</tbody>
</table>

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20 New Arena in the area sited as potential source for additional traffic.

21 New Arena in the area sited as potential source for additional traffic.
8. **Better Provincial HWY Rest Stops Needed.** One company identified an issue with Provincial Highway Rest Stops. The conditions need to be improved to support local truck drivers. There is no heat and no toilets in many. In times of highway shut downs, in storm conditions for example, there are not many comforts for overnight stays at these locations.

<table>
<thead>
<tr>
<th>Jurisdictions Continue To Monitor and Ascertain If They Can Play Secondary Role.</th>
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</table>

9. **Condition of Broadway Ave Redcliff.** One company identified that there is a need for minimum road standards for industrial parks in the region. They used Broadway Avenue as an example - it has no streetlights.

<table>
<thead>
<tr>
<th>Future Consideration.</th>
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</table>

### RAIL

10. **Container Availability.** Two companies mentioned this improvement, both for 40’ marine and high cube containers. This is a western Canada issue. Some steamship lines do not want their containers inland, because they do not get to use them quickly for return trips for their marine operations. This suggests capacity issues with intermodal locally.

<table>
<thead>
<tr>
<th>Jurisdictions Continue To Monitor and Ascertain If They Can Play Secondary Role.</th>
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</table>

11. **Rail Car Availability.** One company mentioned this issue. This usually happens when the railroads experience capacity issues during busy times. This is a western Canada issue.

<table>
<thead>
<tr>
<th>Jurisdictions Continue To Monitor and Ascertain If They Can Play Secondary Role.</th>
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</table>

### REAL ESTATE

12. **Protecting Logistics Clusters and Goods Movement Corridors.** Four companies mentioned this topic. There are opportunities to learn what works best from current developments in the region.

|---|

13. **More Land with Rail to Site.** There needs to be more land options for future rail to help grow the economy. This suggests a local real estate capacity issue.

<table>
<thead>
<tr>
<th>Identify Current and Future Sites.</th>
</tr>
</thead>
</table>

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22 Economic Development resources in the region have confirmed this need (i.e. received calls with this request).
14. **Additional Warehousing Capacity Needed.** Two companies mentioned a need for more local warehousing capacity. One specifically mentioned the lack of a bonded warehouse in the region. This suggests a local real estate capacity issue.

<table>
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<tr>
<th>Jurisdictions Continue To Monitor and Ascertain If They Can Play Secondary Role.</th>
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</table>

**LABOUR**

15. **Labour Issues.** Three companies identified labour as a constraint on their operation. Two mentioned negative experiences with the Provincial Nominee Program as well. This result is not surprising given the unemployment rate figures.

<table>
<thead>
<tr>
<th>Jurisdictions Continue To Monitor and Ascertain If They Can Play Secondary Role.</th>
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</table>

16. **Canadian Food Inspection Agency (CFIA) Inspectors.** Two companies identified a gap in CFIA Inspection service.

<table>
<thead>
<tr>
<th>Jurisdictions Continue To Monitor and Ascertain If They Can Play Secondary Role.</th>
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</table>

The macro-economic level review states that the economy appears to be performing well – which suggests a functioning transportation system. The above improvements via survey results suggest some transportation capacity issues, real estate capacity issues, and labour capacity issues. The areas of potential action, if completed, will lead to improvements in the transportation system of Southeast Alberta – theoretically leading to an improved regional economy and increasing the region’s competitiveness.

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23 Real Estate definition includes warehousing, serviced industrial land, appropriately zoned land, etc.
Future State – A Vision for What Might Be

The vision for the future state of the SE AB Transportation System includes the Highway #1 Bypass. In addition to this major road infrastructure improvement, three future system improvements were tested with the survey. They are:

- An improved border crossing at Wild Horse (e.g. longer hours of operation, improved processing and a commercial border), south of the region for additional access to Montana and points beyond in the US;
- New Transload facilities, and commodity was not specified;
- A new Intermodal terminal.

The interview results are presented below.

Wild Horse Port of Entry

The response to commercial processing and extended hours of operation at the Wild Horse Port of Entry were very positive. Many companies identified the need to improve the road to the crossing as well. Of the 24 companies interviewed, 37.5 % responded with interest in the border concept (including: NaturEner Energy Canada, Torq Capital, Source Energy, Caron Transportation Systems and Landmark Feeds).

Note that 37.5 % of all interviewees is a very positive result as only 20 of the 24 interviewees directly move goods. So 45% of the organizations involved directly in goods movement responded with interest. This 35.7% result is even more significant when considering that not all of the 20 goods movement companies have business in the US.

Of the nine positive responses, two responded that they would need to take a closer look, and one company responded yes because of the need for a better road, not the border crossing. Five of the positive responses provided potential additional truck usage for the port of entry. This combined traffic equates to 2,605 – 2,970 trucks per year. Two companies also provided potential new jobs that could be created for their organizations. These included additional drivers, sales, etc. The combined totals for these two companies were 11 – 12 new employees.

Given the results above and the potential positive impacts for the region and beyond, it is recommended that additional follow up with these companies be completed.Ascertain how they want to be involved with a program that looks to work towards getting the required investment for this future infrastructure (i.e. letters of support, lead and champion, etc.).
Transloads

The direct response to new transload facilities in the region was low. One company identified the need for additional sand transloading capacity. That said, a closer look at the interview results suggests a potential for future demand.

Two interviewees in the energy sector are contemplating expansion, or have already expanded. Additional research within the energy sector is required to confirm this potential.

The identification of possible future demand was triggered by what is not seen in the region for transloads. In other regions involved in the energy sector there is typically more transload capacity for sand and larger drilling fluid transloads. Also facilities usually move commodities like pipe and portland cement. Local experts explained that the reason why the region does not have as many facilities is because the local wells are shallower. Therefore they use tubing not pipe, do not require as much cement capping and require less fracing sand.

One industry trend that was mentioned in the interview process suggests future growth for the region. The drilling activity for the Bakken is moving west. One interviewee suggested that there is a role to play for the Medicine Hat region as a point of delivery to this energy sector activity in the future. If this is true, and the wells in this area are also deeper, then there could be a need for many new transloads in the region. Additional sand, pipe, portland cement, etc. capacity will be required in the region. Border investment could also be link to this opportunity, as part of this activity will occur south of the Wild Horse area. Methanex is potentially a significant local user of the new border crossing, and methanol is used for fracing.

It is recommended that additional energy industry interviews be completed to get a better understanding of the potential impacts of the Bakken activity on the region.

If this opportunity is validated, it is recommended that the region start to plan for a scenario where a significant increase in transload capacity is required in the region linked to growth in the energy sector. What can be done to prepare the region to take advantage of this potential opportunity?

Lastly, there is a potential for a fuel depot in the region that requires additional research. Two interviewees confirmed the potential. One suggested that there is a large market, including the military. The other interviewee suggested that the region is supplied by truck
from the Coop Refinery in Regina. If this is true, then the supply point is a 4.5 hour and 466 km truck route. Rail rates to move product over this distance compared to truck should be competitive. There should be an opportunity to get fuel to the region by rail for less, and have a tank farm operation.

**New Intermodal Terminal**

The direct response for a new intermodal terminal was significant from the number of companies, but the number of containers is not currently there to support railroad involvement. Of the 24 companies interviewed, six indicated an interest in a new intermodal terminal. This equates to 25%. Again keep in mind that not all interviewees are shippers, and could respond positively, as they do not move freight.

All the companies that responded positively reported a current use or potential future use. The combined traffic equates to 1,610 – 1,910 containers per year. Though these containers are very important to the local economy, and a reduction in intermodal cost could help the region, this rate of use is too low to expect railway investment. An increase in transit time for intermodal compared to truck could also impact the number of the above containers that would actually ship.

Surveys should continue, but a significant additional amount is needed to work on this development with the railway in the near term.

One company surveyed suggested that the region could investigate the setup of an intermodal terminal without the railway owning and operating it. As this is entrepreneurial and theoretically beneficial to the region, this suggestion is noted.

Research did not yield an inland intermodal terminal operated in Canada by any party other than a railway. The endeavor will require pioneering. It is recommended that future demand tests include realistic service times and a meticulous understanding of the future rate impacts. Due diligence on the financial risk, an in-depth study of the concept is recommended prior to commitment.

Working with the railway is recommended. Specifically, a planning session with CPR is recommended for all future infrastructure needed in the region. Considering the region is dependent on rail, planning for its use and interaction with industrial development/road network is recommended. Topics like Brier Park crossing can be assigned a near term priority. Topics like potential future transloads and rail to site needs can be assigned medium term priority (0 to 5 years). Intermodal can be assigned a long-term planning priority (5 to 50 year time frame).
The future vision of the SE AB Transportation System will include a HWY #1 bypass and free flowing traffic east to west. Given the survey results, commercial processing and extended hours of operation at Wild Horse, and new transload facilities should be included in the vision. A regional intermodal facility is less likely as the local volume of containers to support rail involvement has yet to be identified. These new infrastructure improvements should be considered in a planning exercise that will focus on protecting job creation nodes, and finding locations in the region ideal for this future industrial growth to occur.

5. Working Together

From a planning perspective, working on a regional scale is not a new concept. In fact the Provincial Ministry of Municipal Affairs is in the process of updating legislation to do so. This already occurs in the region. Other regions in the province work together on economic development projects, co-marketing, and there are tax-sharing agreements. The next section will explore a few examples in Alberta.

People in the Region

Interviews identified four key people from industry in the region that could champion and lead projects related to economic development efforts in the transportation sector. This includes work on a commercial border, in the setup of container stuffing facilities, especially for agricultural products, and understanding the potential energy sector growth in the region. All show great understanding of the local goods movement business and the local economy. It is recommended that local business outreach continue, especially with these key people, to leverage the human capital that exists in the region while trying to work together.

Other Examples

The Aldersyde Corridor in the Calgary region has precedence for joint planning, investment attraction and tax sharing, “Cargill is approaching its 20 year anniversary, based on a tax sharing agreement.” Through the Rise brand, Alberta Foothills Region, the M.D. of Foothills, High River and Okotoks collectively market the corridor for industrial land development.

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25 Tri-Area Inter-municipal Development Plan (IDP) group plans in the Southeast Alberta Region.
As other jurisdictions in the province are able to collectively work on land development with road and rail opportunities, it can serve as an example to the possibilities in the SE AB Region. These stakeholders benefit from increased marketing power from combined resources, and probably understand that business goes where it is suited. Business does not care about jurisdictional lines or postal code. The jurisdictions have created a governance model where a rise in tides raises all boats.

The County of Grande Prairie No. 1 is an example of a jurisdiction working with private industry to achieve the development of a logistics park. Through an RFP process a private industry partner, “has been chosen as the successful applicant to proceed with discussions with the County for the development of a Memorandum of Understanding (MOU), which would outline the proposed development of the 107 acre site. The site, which has the support of CN Rail, is strategically located next to the railroad as well as adjacent to Highway 43 and Highway 2. It is located at the heart of the Clairmont Industrial Area.” 28

The above example also includes coordination with the local rail company CN, and demonstrates that these development projects can take many forms.

**Governance**

Governance is required to work together. The Provincial Ministry of Municipal Affairs provides several governance options for municipalities to consider if they want to coordinate service delivery:

“Governance Options

The governance options available to municipalities considering regional services delivery Intermunicipal agreement: Regional services commissions, Municipal controlled corporations, Cooperatives, Societies, Part 9 (not for profit) companies, Public-private partnerships.” 29 There are also provisions for profit organizations through Municipal controlled corporations.

There are benefits to working together, like leveraging budgets for economic development. There is a lot of work involved with setting up and maintaining these working relationships. The three municipalities should gauge the political will, effort etc. associated with working together to determine the benefits of the effort.

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6. Conclusions

Macro-economic data, such as a regional 2.2% unemployment rate, was presented in the report to show that the local economy is healthy; therefore its transportation system must be performing in a reasonable way.

Two investment related examples were presented in the report; Methanex’s proposed $1 billion expansion, which was the region’s top business story of 2013. The closure of Halliburton’s Field Office was also presented. These stories illustrate that a region’s reach via its transportation network can determine if a company will stay or leave a region.

The Southeast Alberta Transportation System is very important to the regional economy. Over 40,000 truck and rail goods movement trips were identified in the survey. This is a portion of the local traffic. The RedHat Co-operative Ltd. example was presented to illustrate how a 95,500 SF distribution center in the region actually indirectly supports 775 jobs. Fifteen organizations surveyed in the region provided employment data; and 1,643 jobs were identified as being directly dependent on the transportation system.

The rail mode is very important to the local economy too. Sectors like manufacturing, energy and agriculture all have companies in the region dependent on the mode. For example companies like Methanex, CF Industries, Richardson Pioneer, Parrish & Heimbecker and Trican Well Services Corporation are dependent on rail to operate in the region. Secondly, CPR onto itself employs 325 people in the region. Lastly, Brier Park is a great example of how industry clusters around major rail infrastructure.

The road network is also very important for the regional economy. All the companies above use the road network. Companies like Goodyear and Source Energy are very dependent on the road network and trucking. Sectors not mentioned above like value added food and value added agriculture are road dependent too. Companies like RedHat Co-operative Ltd. and Landmark Feeds Inc. are examples in these sectors that are road dependent.

Where the road and rail networks meet is important to the region. Many transloads exist in the region to support local business. Sand for fracing is a commodity that comes into the region via rail and is transloaded. Energy service companies like Calfrac are very dependent on this commodity. These transload facilities also support capital projects. NaturEner’s wind farm construction in the southeast of the region will use a transload facility.

Given their importance, these points of intersection of the modes need to be planned well and protected. The report also gave an example to the potential growth of this traffic in the region given the Bakken westward movement.
There are local examples of the successful clustering of industry around rail infrastructure in Brier Park. Room for future growth for rail dependent industry is needed in the region. There are not many areas in the region that were identified to support both future rail to site and transload business.

The future city bypass will impact how goods move in the region and where industrial development will need to occur. It is important that the local community is involved in the planning process.

The transportation system is important to the economy in the region. Its infrastructure crosses all the stakeholder jurisdictions, and planned by the Provincial Government and the Federal Government. Like any system, its optimal planning requires a systems approach. To maximize its potential, planning on a regional scale is needed. This planning can protect future industrial job growth areas, and local goods movement corridors. As the regional economy is dependent on rail, planning with CPR will help with the above regional planning goals.

There are many governance options to work together on future development that are identified in the report. There is precedence of it working in the province with the Aldersyde Corridor example. The Grande Prairie example also shows that it is possible to work with private industry, and coordinate with rail companies in the province to bring these logistics industrial development projects to fruition.

More study into the energy sector is needed. Experts in the sector can help validate the potential role for the region on the Bakken. The quantification of this potential will assist the region to plan and prepare to take advantage of the opportunity.

Lastly, additional outreach to business is required. The current effort was received well by many local companies. The outreach identified potential advocacy initiatives, business opportunities, planning opportunities, competitive advantages, and human capital in the region. Additional effort will still yield opportunity and allow economic development to leverage local human capital.
Appendix A – Organizations Contacted

1. Alberta Innovation and Advanced Education,
2. Alberta Transportation,
3. Calfrac Well Services,
4. Cancarb,
5. Caron Transportation Systems,
6. CFIndustries,
7. Canadian Pacific Railway (CPR),
8. Ferus,
9. Goodyear,
10. Landmark Feeds,
11. Meggit,
12. Methanex,
13. Military,
14. NaturEner Energy Canada,
15. Parrish & Heimbecker,
16. ProLog Canada Inc.,
17. RedHat Co-operative Ltd.,
18. Richardson Pioneer,
19. Rosenau Transport Ltd,
20. Saamis Moving & Storage,
21. Source Energy,
22. Torq Capital,
23. Trican Well Services Corporation,

24. Wedding Star.