



# The Greater Vancouver Gateway Canada's Platform for Global Trade Growth

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# Greater Vancouver Gateway Council

## Members

Vancouver Fraser Port Authority  
Vancouver Airport Authority  
BC Marine Terminal Operators  
ASSOC. - import/export terminals in BC  
CN  
CPKC  
BNSF  
SYR  
Translink  
BC Trucking Association  
BC Maritime Employers Association

## Resource Members

Transport Canada  
BC Ministry of Transport  
UBC Centre for Transportation Studies  
Asia Pacific Foundation of Canada  
Westac  
Business Council of BC  
Greater Vancouver Board of Trade  
Metro Vancouver  
Pacific Economic Development Canada  
BC Chamber of Shipping

# Greater Vancouver Gateway Council

- **Partnership of port, airport, rail, terminals, trucking, transit, business associations and government leaders.**
- **Coordinates building consensus on priority infrastructure and policy needs for the Gateway region.**
- **Mandate:**
  - **Convene leadership and build alignment**
  - **Champion the Gateway**
  - **Develop unified positions to advance competitiveness, reliability and resiliency**

# Greater Vancouver Gateway Overview

- **Canada's most critical Asia-Pacific trade and transportation gateway**
- **Canada's largest Port and second-largest international airport**
- **Integrates – deep-sea ports, Class 1 railways, highways, pipelines, terminals and air cargo**
- **Complex interdependent system serving both import and export supply chains**
- **Plays a significant national economic and trade resilience role – 80% of Canada's Asia Pacific export trade**

# Trade & Gateway Trends and Challenges

- **Growth in Canada – Asia/Pacific Trade**
- **Competing Commodities - Diverse Commodity Mix and Multi-modal Traffic**
- **Rising Supply Chain Volatility**
- **Visibility, transparency & real-time performance metrics - AI**
- **Regulatory and Policy Change Impacts**
- **Significant Geopolitical Shifts**

Success  
Story:  
Vancouver  
Gateway  
Public  
Investment

- South Fraser Perimeter Road \$1.3B
- Pitt River Bridge & Mary Hill Interchange \$700M
- Canada Line \$2.1B
- Hwy 1/Port Mann \$3.3B
- Highway 91/17 & Delta Port Way \$260M
- Metro Vancouver road improvements \$222M
- 152<sup>nd</sup> Street overpass \$31M
- Patullo Bridge \$1.6B
- Panorama Ridge Project \$11.5M
- Lower Mainland Road improvements \$79M
- South Fraser Perimeter Road Assessment \$4M
- North Shore/2<sup>nd</sup> Narrows Bridge Access \$200M
- George Massey Tunnel
- Hwy 1 through the Fraser Valley
- Surrey-Langley SkyTrain Extension
- Broadway Subway Project
- Moray Channel Corridor

**Over \$10 Billion**

Success Story:  
Greater  
Vancouver  
Gateway  
Public/Private  
Investments  
(APGCI &  
NTCF)



**Over \$1.7 Billion**

Improving road & rail access/capacity  
for goods movement to world markets

Success  
Story:  
Greater  
Vancouver  
Gateway  
Private  
Investment

- G3 Grain terminal \$700M
- Westshore - coal \$385M
- GCT DeltaPort - containers \$300M
- Pacific Elevators - grain \$100M
- Neptune Terminal - coal & potash over \$1B
- PCT – potash & canola oil \$370M
- Richardsons - Grain \$250M
- Westshore – potash \$1B
- Fraser Surrey Docks – grain & canola \$250M
- Lynnterm – steel & project cargoes \$100M
- DP World/VFPA – containers \$350M
- GCT Vanterm \$160M
- Cascadia – grain \$100M
- Westridge Terminal – bulk oil \$500M
- Cargill – grain \$30M
- Vancouver Wharves – liquids, grain \$100M
- Fibreco – grain \$100M
- YVR – 2018 -\$9B 20 year expansion plan \$3B
- Railways over \$4B

**Over \$12 Billion**

# The Real Story – Private Investment Western Canada

- Trans Mountain Pipeline \$34B
- Northwest Redwater/Sturgion refinery \$10B
- Fort Hills Oil Sands Mine \$13.5B
- Kearl Oil Sands Project \$28B
- Highland Valley Copper \$2.2B
- Mount Milligan Copper-Gold Mine \$1.5B
- Brucejack Gold Mine \$800M
- BHP Jansen Potash mine \$7.4B
- K&S Bethune Potash Mine \$4.1B
- Mosaic Potash \$3B
- Nutrien Potash Expansion \$3B
- Agrium/Nutrien Vanscoy Potash \$1.9B
- Read Leaf Pulp – Wheat-Straw Pulp \$350M
- Viterra – Canola Crush plant \$1B
- Cargill Canola Crush plant \$350M
- Ceres Global Canola Crush plant \$350M
- Richardson Canola Crush upgrades \$220M
- BC Interior Woodpellet plants \$300M
- G3 Inland Grain Terminals/Rail track \$1B

**Over \$100 Billion**

# How did we do?

|                | <u>2005</u>  | <u>2015</u>    | <u>2025</u>   | <u>2035</u> |
|----------------|--------------|----------------|---------------|-------------|
|                | <b>APGCI</b> | <b>NTCF</b>    | <b>TDCF</b>   | <b>?</b>    |
| <b>Port</b>    |              |                |               |             |
| - tonnes       | <b>78M</b>   | <b>138M</b>    | <b>170M</b>   | <b>?</b>    |
| - value        | <b>\$60B</b> | <b>\$200B</b>  | <b>\$300B</b> | <b>?</b>    |
| <b>Airport</b> |              |                |               |             |
| - tonnes       | <b>233K</b>  | <b>271K</b>    | <b>360K</b>   | <b>?</b>    |
| - value        | <b>\$10B</b> | <b>\$12.5B</b> | <b>\$19B</b>  | <b>?</b>    |
| - passengers   | <b>16.4M</b> | <b>20.3M</b>   | <b>27M</b>    | <b>?</b>    |

# Federal Government Direction

- **Double non-US export trade**
- **Western Canada greatest opportunity for export growth**
- **Asia-Pacific Opportunities – agri-products, potash, mineral concentrates, liquid chemicals, plastics, crude oil & LNG – predominately dry bulk & liquid bulk commodities**
- **Ports as the primary growth outlets as well as increases in air cargo**
- **Vancouver – 60 – 100M tonnes or 40 – 70% increase  
Prince Rupert – 10-15M tonnes or 50- 80% increase**
- **Outsized effect on transportation requirements – especially Vancouver**
- **TDCF - \$5B over 7 years in transportation infrastructure**

**Nutrien  
Decision:  
Strategic  
Warning  
Signal**

- **Investment decision driven by predictability and control**
- **US gateways marketed certainty over proximity – reliability & timeliness in permitting**
- **Vancouver did not lose on geography or assets**
- **Reliability perception can drive shipper decisions**
- **\$1B investment and jobs to the US**

What needs  
to be in  
Place for the  
Gateway to  
be Successful  
Same list as  
2005

- **Rail Capacity, Congestion & Access**
- **Terminal Capacity and Turnaround Times**
- **Intermodal Interface Friction & Delays**
- **Land Use Pressures and Industrial Land Supply**
- **Regulatory, Permitting, Environment & Community Concerns**
- **Resilience to Disruptions – Recovery Capability**

# We have done it before/We can do it again

|                         | <b>2005</b>  | <b>2015</b>    | <b>2025</b>   | <b>2035</b> |
|-------------------------|--------------|----------------|---------------|-------------|
|                         | <b>APGCI</b> | <b>NTCF</b>    | <b>TDCF</b>   | <b>?</b>    |
| <b>Port - tonnes</b>    | <b>78M</b>   | <b>138M</b>    | <b>170M</b>   | <b>?</b>    |
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| <b>- value</b>          | <b>\$10B</b> | <b>\$12.5B</b> | <b>\$19B</b>  | <b>?</b>    |
| <b>- passengers</b>     | <b>16.4M</b> | <b>20.3M</b>   | <b>27M</b>    | <b>?</b>    |

# Governance and Alignment Objectives

- **Align government jurisdictions and agencies**
- **System-wide coordination, not siloed optimization**
- **Rail/terminal capacity, resiliency and operating protocols critical - coordination**
- **Service reliability free of disruptions – labour, protests & climate impacts**
- **Government & Industry – convening mechanism to achieve collaboration and alignment**

## Strategic Takeaway

**Gateway's Future Competitiveness  
Will be determined less by what we have,  
and more by how reliable and efficiently it  
operates as a system**

- **Capacity, reliability and coordination are decisive factors**
- **Opportunities exist if risks are addressed proactively and collaboratively**
- **Industry voice critical to shaping solutions**
- **Significant need for alignment, consensus and convening leadership – Government and industry need to step up**