



20TH ANNUAL FIELDS ON WHEELS CONFERENCE



Grain Exports to 2035: Is Western Canada Ready?

Wednesday, December 2, 2015
Delta Hotel, Winnipeg

When the first Fields on Wheels conference took place in 1996, the Western Canadian grain supply chain looked very different. The Government of Canada was still contributing \$1 billion to subsidize rail transportation, grain co-operatives dominated the handling sector and the Canadian Wheat Board held a monopoly over all wheat, barley and oat exports. Containers hardly even figured in grain exports, and upstart special crops were still pretty special. Thunder Bay reigned as the dominant grain exporting port. How things have changed!

So, where will Western Canadian farmers be 20 years from now? Many factors are in play. The Asian countries are increasing their incomes as well as their populations. Combined with the TPP, the grain trade to Asia could experience a quantum change in demand. If current population projections are fulfilled, the world will have a billion more mouths to feed by 2035. But the real story may be Africa. Half of that growth will occur in Africa, which is more easily served by the eastern Great Lakes-Seaway route. The world demand for Canadian grain could look very different two decades from now.

It is far from clear that world leaders will come to grips with carbon emissions in time to reduce the impact of climate change. By 2035, warmer temperatures and extreme weather events could be challenging food production in all parts of the world. Countries like Australia that may be hard-pressed to maintain current levels of crop production; Canada, on the other hand, is one of the few grain exporters that may enjoy an improvement in agricultural production. The greater task may be moving the additional volume of export crops through the Canadian supply chain.

Higher prices and larger markets could be in store for Western Canadian farmers and the grain supply chain. Is the infrastructure sufficient to meet the challenge of moving more grain? Two years ago, the grain handling system was overwhelmed by an extraordinarily large harvest. What if that crop size became the norm? In the wake of the unexpected surge in demand, the federal Government introduced new regulations that may become permanent depending on the CTA Review. Do the current regulations help or hinder system adjustment?

Come to the 20th Fields on Wheels conference where the future of the Canadian grain supply chain to 2035 will be discussed. The topics to be addressed include:

- Export Forecasts and Handling System Growth
- Trade Agreements with Europe and the Trans Pacific Partnership
- The Future of the Railway Revenue Cap
- A Farmer's Marketing Perspective
- Innovations and Investments in System Capacity
- Expectations of the CTA Review

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8:00 – 8:30 a.m. Registration

Morning Chair: **Dr. Barry E. Prentice**, Asper School of Business, University of Manitoba

8:30 – 10:00 a.m. Session 1 – MEDIUM AND LONG TERM FORECASTING
sponsored by St. Lawrence Seaway Management Corporation

“World Grain Marketing: Why the location of population and economic growth is crucial for long term planning”

Mr. Chris Ferris, Senior Grains Analyst, Canada
Informa Economics Inc.

“Trade Agreements and Market Access”

Ms. Claire Citeau, CAFTA

Questions from the floor

10:00 – 10:30 a.m. Networking Break – sponsored by Port Metro Vancouver

10:30 – 12:00 p.m. Session 2 – RAILWAY CAPACITY AND EXPANSION
sponsored by TBA

“Effect of the Railway Revenue Cap on Western Canadian Grain Handling & Transportation System”

Dr. Graham Parsons, OWEC

Reaction Panel:

Grain Producer: **Mr. Steve Dziver**, Principal, SAMC
Commodity Analyst: **John DePape**, President, FARM Co

Questions from the floor

12:00 – 1:30 p.m. Lunch – Keynote Speaker:

“A view from the farm, then, now and in the future?”

Mr. Colin Hudon, Nuffield scholar

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Afternoon Chair: **Ms. Oksana Exell**, President & CEO, WESTAC

1:30 – 2:45 p.m. **Session 3 – INNOVATIONS AND INVESTMENTS IN SYSTEM CAPACITY**

“Grain Supply Chain infrastructure and Corridors”

Mr. Mark Hemmes, Quorum Corporation

“Future of the Eastern Route”

Chris Heikkinen, Communications and Research Coordinator, Port of Thunder Bay

“Container VCMx Exchange”

Mr. Darhl Vercaigne, President

Questions from the floor

2:45 – 3:15 p.m. **Networking Break sponsored by: Cando Rail Services**

3:15 – 4:30 p.m. **Session 4 – SUPPLY CHAIN CHALLENGES, OPPORTUNITIES AND PERFORMANCE MEASUREMENTS**

“Overview of CTA Submission & MRE Investigation”

Murdoch MacKay, Chair, Crops Logistics Working Group III

John Coleman, Senior Fellow, RGI, School of Public Policy & Administration, Carleton University

Questions from the floor

4:30 p.m. **Session 5 – RAPPORTEUR**

Ken Veldman, Director, Public Affairs, Prince Rupert Port Authority

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