

The Conference
Board of Canada

Corridors of Prosperity

Transforming the Future of Canada's Trade Infrastructure Network



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Key findings

- Canada's trade performance has been slipping for decades. In 2024, while our export volume of energy and services had increased by 75 per cent and 90 per cent since 2004, our export volume of goods had only grown by 7 per cent.
- Canada needs a long-term strategy for its trade infrastructure network. While shortlisting projects of national interest is helpful, a systems-level vision of the trade network is required to deliver federal and provincial-territorial strategic objectives, which include our industrial policy.
- Canada is diversifying. While some trade infrastructure projects reflect traditional trade patterns with the United States, many others are oriented toward a more diverse export future that looks to European and Asian markets, among others.
- Public-private collaboration plays a central role in creating projects, particularly with regard to deploying new technology in the trade infrastructure network. We uncovered several examples of institutional coordination across organizations and governments. There are also growing instances of trade infrastructure projects situated within a larger development strategy (e.g., corridor planning).
- Canada has focused on building capacity across its primary trade infrastructure network, such as the Port of Vancouver and the mainline rail network. Strategic investments in secondary regional infrastructure (e.g., secondary ports) can act as critical complements in building resilience and redundancy into the trade network.
- Inland ports can increase intermodal efficiency and transshipment, particularly from truck to rail, which also reduces emissions per tonne-mile. Inland ports can also relieve the pressure and congestion surrounding maritime ports and introduce route flexibility, which gives shippers much-needed optionality.
- Canada has several examples, at various stages of readiness, of trade infrastructure projects that advance federal and provincial-territorial strategic objectives in trade and trade infrastructure. These transformative trade infrastructure projects exemplify the long-term vision for the future of the trade network.
- With seismic shifts in the economic and geopolitical landscape, Canada should adopt a mission-critical approach to trade diversification and infrastructure deployment. However, pace should be balanced with prudence. Meaningful consultations with Indigenous rights holders and other communities will be indispensable to our success.

Canada: A trading nation under pressure

The wealth of nations is built on trade. While Canada has historically been enriched by a trade dividend, it is currently navigating a trade landscape with shifting alliances in a warming and volatile world. Its trade infrastructure network was not built for these times. Canada can meet the moment with strategic investments in transformative trade infrastructure projects.

These projects can improve network efficiency, unlock new trade corridors and markets, mitigate and adapt to climate change, and advance Northern development.



The trade imperative

Canada's trade network is at an inflection point—it is being challenged to respond to tectonic shifts in our trade fortunes. The risk and uncertainty of a prolonged trade war with the United States, which accounts for 75 per cent of our trade, is the latest challenge. That said, Canada's trade performance has been slipping for decades. In 2024, while our export volume of energy and services had increased by 75 per cent and 90 per cent respectively since 2004, our export volume of goods had only grown by 7 per cent. (See Chart 1). Consequently, Canada's share of global trade is shrinking. In 2000, Canada captured 4.1 per cent of the global export market, declining to 2.3 per cent in 2023.¹

The *Building Canada Act*

Against this backdrop, on June 6, 2025, the federal government proposed the *One Canadian Economy Act*, Bill C-5. In its current form at the time of writing, this bill would enact the *Free Trade and Labour Mobility in Canada Act* and the *Building Canada Act*. The *Building Canada Act* will, by government order and in consultation with provincial or territorial governments and Indigenous peoples, shortlist a small number of national interest projects for accelerated federal regulatory approval, i.e., reducing approval timelines from five years to two years, subject to conditions.²

¹ World Bank Group, "Exports of goods and services (current US\$)."

² Intergovernmental Affairs Secretariat, "One Canadian Economy."

According to the federal government, examples of major projects that may be shortlisted include highways, railways, ports, airports, oil pipelines, critical minerals, mines, nuclear facilities, and electricity transmission systems.

Five broad factors will be considered for the inclusion of national interest projects under the *Building Canada Act*.³ These include the extent to which the project can:

- strengthen Canada’s autonomy, resilience, and security
- provide economic or other benefits to Canada
- have a high likelihood of successful execution
- advance the interests of Indigenous peoples
- contribute to clean growth and to meeting Canada’s objectives with respect to climate change⁴

The *Building Canada Act* doesn’t exist in isolation. As part of his administration’s trade diversification strategy, Prime Minister Mark Carney pledged a \$5 billion Trade Diversification Corridor Fund during an electoral campaign press conference at the Port of Montreal.

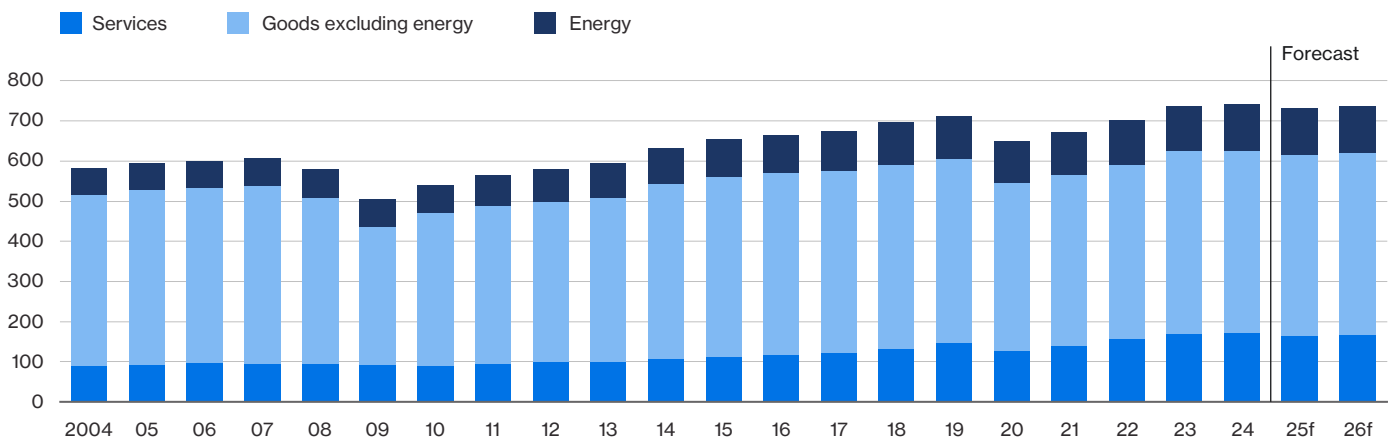
Details of this anticipated fund include the following commitment:

“We will inject \$5 billion into a new Trade Diversification Corridor Fund, to build the infrastructure that will help diversify our trade partners, create good jobs, and drive economic growth. This fund will accelerate nation-building projects at ports, railroads, inland terminals, airports, and highways. This will build one Canadian economy and diversify our trade away from the United States.”⁵

The *Building Canada Act* and Trade Diversification Corridor Fund are encouraging. That said, the balance of speed and the quality of consultations with Indigenous rights holders will be crucial—some Indigenous groups have expressed concerns regarding the pace of consultation.⁶ Together with Canada’s 15 free trade agreements covering 51 countries,⁷ these twin measures, if executed judiciously, could address Canada’s need to build projects at the speed of opportunity. They can also advance the forging and deepening of ties to markets beyond the United States.

Chart 1

Canada’s growth in non-energy goods exports is stalling
(2017 \$ billions)



Sources: Statistics Canada; The Conference Board of Canada.

3 Intergovernmental Affairs Secretariat.
 4 Intergovernmental Affairs Secretariat, “One Canadian Economy.”
 5 Liberal Party of Canada, “Mark Carney’s Liberals.”
 6 Passafiume, “Major projects will be slowed.”
 7 Trade Commissioner Service, “Canada’s free trade agreements.”

A strategic vision for Canada's trade network

To prepare for future growth, Canada will need to invest \$4.4 trillion into its transportation infrastructure system between 2020 and 2070.⁸ Despite this fact, research from Canada's National Supply Chain Task Force shows that investment in the trade network is consistently failing to keep up with rising trade volumes.⁹ The impact of this is visible in growing network congestion, proliferating bottlenecks, and longer end-to-end travel times. Canada's largest port, the Port of Vancouver, is now considered one of the world's least efficient container operations.¹⁰ Amongst other factors, repeated disruptions to its operations, including labour disputes, have not helped. As a result, Canada's reputation as a reliable trading partner and attractive investment location is eroding.¹¹

Canada needs to join other advanced economies in developing a long-term strategy for its trade infrastructure network.¹² While shortlisting projects of national interest is helpful, a systems-level vision of the trade network is required to deliver federal and provincial–territorial strategic objectives. Furthermore, this vision can aid the optimization of trade network efficiency in a manner that bolsters Canada's industrial policy.

To establish the pillars of this vision, we reviewed over 40 federal and provincial–territorial trade-related strategy documents that were introduced or modified between 2008 and 2024. These documents were related to trade and trade infrastructure, economic growth and productivity, climate change mitigation and adaptation, and Northern development. From this review, four strategic pillars for forward-looking trade infrastructure emerged:

Improving the network's efficiency and capacity

Trade infrastructure that mitigates congestion and bottlenecks across the network, increases connectivity, and reduces end-to-end travel times.

Developing new product markets

Trade-enabling infrastructure that supports the development of new product markets in key areas of our industrial policy, such as critical minerals and hydrogen; for example, road connectivity in mineral-rich regions.

Advancing Northern development

From critical minerals development to Arctic sovereignty and Indigenous-led major projects, the urgency of investing in Northern trade infrastructure has broad consensus in Canada.

Climate change mitigation and adaptation

Canada needs trade network projects that mitigate emissions and are resilient to climate change. Building a net-zero economy will require both investment in new fuel infrastructure (e.g., hydrogen for heavy-duty trucking) and diverting a greater share of freight traffic to the rail network, which emits far less greenhouse gases per tonne-mile.¹³

Canada's trade network also needs to build resiliency in the face of more frequent and intense extreme weather events—from atmospheric rivers to wildfires, hurricanes, and other climate-related disruptions. The network's reliability is increasingly tied to our ability to plan for and adapt to these events.

8 Transport Canada, *Action, Collaboration, Transformation*.

9 Transport Canada.

10 World Bank Group, "The Container Port Performance Index 2023."

11 Law and Dade, *From Shovel Ready to Shovel Worthy*.

12 Fellows and others, *Northern Corridor Research Program*.

13 Laska, *Freight Rail's Role in a Net-Zero Economy*.

Transformative trade infrastructure projects

Transformative trade infrastructure projects advance one or more of the four strategic pillars outlined above. These projects exemplify the long-term vision for the future of the trade network.

To provide examples of transformative trade infrastructure projects in Canada, between May 2024 and October 2024, we engaged stakeholders who are closely connected to the day-to-day operation of the trade network. As opposed to a top-down view, these entities provided a view from the ground, highlighting projects that address core challenges and opportunities across modes of trade transportation infrastructure while advancing the strategic pillars. We used three channels for our engagement: a nominations portal for transformative infrastructure projects, stakeholder interviews, and a roundtable and workshop. Additional details are provided in the Methodology section.

It is important to stress that we only considered transformative infrastructure projects on the trade network. Other important, but non-trade-network infrastructure projects, such as transmission lines, liquefied natural gas (LNG) facilities, pipelines etc., were excluded. Furthermore, the examples of transformative infrastructure projects profiled in this report are not presented in any order of priority. These projects are at different stages of readiness: Some have undergone years of study and are approaching final investment decisions, while others are less mature and still require impact and cost-benefit analyses. All represent trade infrastructure on the horizon today that speaks to the opportunities of tomorrow. Any efforts to prioritize these projects will require additional work involving proponents, governments, Indigenous rights holders, financial institutions, and other entities.

Bottlenecks in Canada's Pacific gateway

Canada's largest port, the Port of Vancouver, ships as much cargo every year as Canada's next five largest ports combined. According to the World Bank's Container Port Performance Index, it is also one of the worst-performing container ports in the world.¹⁴

While improving the flow of goods through Canada's Pacific gateway is widely recognized as key to Canada's long-term competitiveness, policy-makers have struggled to make headway in recent years. Solving congestion problems and long dwell times will require a combination of solutions.

One solution is to add capacity. There are currently several major expansion projects proposed for Western Canadian ports. At the Port of Prince Rupert, the Fairview Container Terminal is being expanded, alongside the development of the new CANXPORT Logistics Hub. The Port is also proposing the development of a second terminal, which would add an additional two million 20-foot equivalent units (TEUs) of capacity. At the Port of Vancouver, the proposed \$3.5 billion Robert Banks Terminal II project will increase port capacity by 2.4 million TEUs, or 30 per cent.¹⁵ Furthermore, Global Container Terminals (GCT) is proposing the Deltaport Berth 4 project, which will potentially add 2 million TEU of capacity at the port.

A key challenge facing the Port of Vancouver is limited rail capacity that services existing terminals and potential expansions. The challenge is not only moving goods on and off vessels, but also moving goods in and out of the port itself. Major priorities in this regard should be to expand rail capacity across the New Westminster and Second Narrows rail bridges in the lower mainland.¹⁶

Another solution is to make better and more creative use of smaller port infrastructure, including the Ports of Nanaimo and Port Alberni. This approach coheres with remarks made by Prime Minister Carney on March 28, 2025, where he committed to "authorize Canadian ports to cooperate instead of compete, in order to maximize efficiencies by leveraging comparative advantages."¹⁷ The comparative advantages of small ports like Nanaimo and Alberni present opportunities for the network.

¹⁴ World Bank Group, "The Container Port Performance Index 2023."

¹⁵ Port of Vancouver, "Roberts Bank Terminal 2."

¹⁶ Western Transportation Advisory Council, *2025 Compass Report*.

¹⁷ Liberal Party of Canada, "Mark Carney's Liberals announce plan to diversify Canadian trade."

Exhibit 1

Map of transformative trade infrastructure projects



Source: The Conference Board of Canada.

Port of Nanaimo

The Port of Nanaimo, in partnership with DP World, has proposed expanding its Duke Point Terminal. Along with the terminal expansion, the City of Nanaimo and port authority are also planning complementary warehousing and distribution facilities.¹⁸



This project provides new cargo capacity, but also delivers a more collaborative and resilient supply chain. A key feature of the Duke Point proposal is expanding the use of short sea-shipping barges, which would transport goods to and from the mainland and up the Fraser River to a distribution point beyond Vancouver-area bottlenecks.¹⁹

Expanding capacity at the Port of Nanaimo would not only build greater flexibility and redundancy into the West Coast supply chain, but would also make Vancouver Island more resilient to climate-related disruptions, which increasingly threaten to isolate the island's residents. For instance, an atmospheric river in 2021 resulted in severe disruptions to operations at the Port of Vancouver. A similar event in future could cut off communities on Vancouver Island.

A potential complement to the Duke Point proposal is the redevelopment of the Island Rail Corridor on Vancouver Island, which connects Courtenay in the north and Victoria in the south. Constructing a spur to Duke Point would create opportunities to increase rail freight on the island, including connecting the ports of Nanaimo and Port Alberni.²⁰

¹⁸ Association of Pacific Ports, "Nanaimo's Duke Point Terminal Expansion."

¹⁹ Association of Pacific Ports, "Nanaimo's Duke Point Terminal Expansion."

²⁰ British Columbia Ministry of Transportation and Infrastructure, *Island Rail Corridor Freight Analysis*.

²¹ CentrePort Canada, "About CentrePort."

²² CentrePort Canada.

Increase inland terminal capacity

With supply chains becoming increasingly intermodal, inland terminals play a critical role. They provide transshipment services, typically moving goods between truck and rail networks (and in some cases, air freight networks).

As global container ports like the Port of Vancouver and the Port of Halifax face challenges related to land access and community restrictions, inland facilities can help reduce congestion by moving transshipment and logistics services further inland. They also facilitate greater use of the rail network, helping to reduce supply-chain emissions.

The recent success of CentrePort Canada, located in Winnipeg and Rosser, Manitoba, provides a case in point. Since 2018, CentrePort Canada has put 2,300 acres of land into development, becoming Canada's largest inland port. It now hosts a wide variety of trucking carriers, shippers, and logistics providers. As a tri-modal facility, it connects directly to the highway network, Winnipeg James Armstrong Richardson International Airport, and the mainline rail network—functioning not only as a vital transshipment hub, but also a key node in east-west and north-south supply chains.²¹

CentrePort was also designated as one of the many foreign trade zones in Canada. Foreign trade zones play a significant role in enhancing trade fluidity by offering a suite of single-window government programs and policies that reduce costs, simplify logistics, and improve competitiveness for businesses engaged in international trade.²²

We'kopekik Inland Shipping Terminal

In Onslow, Nova Scotia, approximately 100 kilometres north of Halifax, the We'kopekik Inland Shipping Terminal will be Atlantic Canada's first inland port and railyard.²³

The project is the result of an equity partnership between Canadian Rail Equipment Works and Services and Millbrook First Nation. The shipping terminal aims to ease space and capacity constraints at the Port of Halifax by shifting transshipment and warehousing inland—a more affordable and energy-efficient approach than adding new storage space at the port itself.²⁴

The inland facility would also help address congestion in downtown Halifax, which acts as a further constraint on port expansion. On an average day, 500 trucks (close to 20 per cent of daytime traffic) travel across downtown Halifax. By transferring more of this traffic to rail further inland, the We'kopekik Inland Terminal will improve livability for Halifax residents.²⁵

Prairie Economic Gateway

The Prairie Economic Gateway proposal for the City of Calgary and neighbouring Rocky View County includes the development of a 2,100-acre industrial and rail park connecting to the Canadian Pacific Kansas City Limited (CPKC) mainline.



23 Taplin, "We'kopekik Inland Port."

24 Cininni, "Millbrook First Nation partners with rail company."

25 O'Toole, "Options to Address Quality of Life Concerns."

26 City of Calgary, "Prairie Economic Gateway."

27 Lowe, Alex, "The future of e-commerce."

28 Lowe, Alex, "The future of e-commerce."

29 Lowe, Alex.

The park would also provide access to CN and CPKC intermodal hubs and Calgary International Airport. This configuration would provide access to both east-west and north-south highway trade corridors, enhancing network connectivity.

The Gateway initiative is designed to expand transshipment, logistics, and distribution capacity in the region, serving a range of industries, from manufacturing to agriculture to energy. The initiative is projected to drive close to \$7 billion in public and private investment.²⁶

Edmonton International Cargo Hub

Edmonton International Airport is proposing a \$300 million multi-modal cargo hub, combining both air and groundside infrastructure investments.²⁷

The airport aims to take advantage of its location at the intersection of east-west trade routes in Canada and its unique proximity to Asian markets via circumpolar navigation. The expanded cargo hub will include warehousing and cargo handling facilities and a state-of-the-art automated ecommerce logistics and distribution initiative.²⁸

The proponent's goal is to position Edmonton as a primary gateway for ecommerce shipments into North America from Asia. From Edmonton, goods can be transferred directly to either the highway system or the Class 1 rail network.²⁹

Enabling Canada's hydrogen economy

The hydrogen economy is poised to play an important role in Canada's energy future. The federal government's 2020 Hydrogen Strategy involves a more than sixfold increase in Canadian hydrogen production—from 3 million tonnes in 2020 to 20 million tonnes in 2050. It aims to deliver 30 per cent of Canada's end-use energy by 2050. Beyond domestic uses, export opportunities are key. The strategy seeks to position Canada as a major global hydrogen exporter to target markets in the United States, Japan, Korea, and elsewhere.³⁰

Hydrogen and its derivatives, like ammonia, are expected to play a critical role in the decarbonization of heavy-duty trucking and maritime shipping. Canada's hydrogen economy has several advantages, including a skilled energy workforce, ample natural gas feedstock for blue hydrogen production,³¹ renewable energy resources for green hydrogen, and established technological expertise.³²

The Canadian government signed memoranda of understanding with the Netherlands in 2021, Germany in 2022, and South Korea in 2023, all with the goal of developing an international supply chain for hydrogen.³³ But Canada doesn't yet have the necessary enabling infrastructure. Enabling the hydrogen economy should involve supporting the development of port-based hydrogen hubs and investing in road-based hydrogen refuelling infrastructure. Without compromising safety, there is also a need to explore innovative approaches for the large scale transport of hydrogen or ammonia, such as unit train transport via rail to ports. This is particularly important for exports from landlocked regions like Alberta, which dominates Canadian hydrogen production.



Regional ports as hydrogen hubs

Global Ports Hydrogen Coalition, part of the International Energy Agency's Hydrogen Initiative, point to the critical role ports will play in the global hydrogen ecosystem.³⁴

Ports, in this view, will become the infrastructural backbone for hydrogen development and distribution, supporting uptake in the shipping sector and domestic industry and building a market for international trade.

In Atlantic Canada, several port projects are aiming to put Canada at the forefront of this movement, using wind energy to develop green hydrogen for export.

For example, the Port of Belledune in northwestern New Brunswick has proposed a green hydrogen facility as part of a new green energy hub. The project would develop 500 MW of wind energy to produce green hydrogen. The port has agreements with the ports of Rotterdam and Hamburg to create a direct trade corridor to Europe.³⁵

The Port of Argentia, located in Placentia Bay at the southern tip of Newfoundland and Labrador, has partnered with Pattern Energy to build a 200 MW wind-powered hydrogen and ammonia production facility. The \$1.5 billion project is the first in Canada to identify an offtake customer.³⁶

30 Natural Resources Canada, "The Hydrogen Strategy."

31 Natural Resources Canada, "Canada is creating a competitive environment."

32 Natural Resources Canada, "Hydrogen opportunities: Key findings."

33 Natural Resources Canada, *Hydrogen Strategy for Canada: Progress Report*.

34 World Ports Sustainability Program, "Global Ports Hydrogen Coalition."

35 Port of Argentia, "Ports Sign Letter of Intent."

36 Cooke, "Newfoundland's Smallest Green Hydrogen Project."

Point Tupper Green Hydrogen Hub

Atlantic Canada's largest and most advanced proposed green hydrogen production and export site is slated to be built at Point Tupper, on the Strait of Canso.



Proposed by Everwind Fuels, the project entails a combination of wind energy development alongside a large green hydrogen and ammonia production facility, which promises to produce over 1 million tons of hydrogen and ammonia each year.

The project will be powered by existing wind energy resources, but subsequent phases will be supported by three new wind farms, primarily located in Colchester County, N.S., producing a total of over 500 MW of renewable electricity.

As a production and export site, Point Tupper offers several advantages. It is a natural deep-water harbour able to accommodate ultra-large ships. It is ice-free and located on the Great Circle Atlantic Shipping Route, providing high-quality access to trans-Atlantic markets.

Bear Head Energy, which had previously proposed an LNG terminal at Point Tupper, has also proposed transitioning the project to a hydrogen and ammonia production facility. One advantage is that existing LNG tank foundations can be repurposed to develop hydrogen storage tanks. The Bear Head site is permitted for as much as 2 GW of electrolyzer capacity.³⁷

Hydrogen highways

Hydrogen vehicles have the potential to be the primary net-zero technology solution for heavy-duty trucking because they can accommodate heavier weights and faster refuelling times than battery electric vehicles.³⁸ But the transition to a hydrogen-based road freight network is complex. The ecosystem remains nascent and depends on the coordination of different technologies and stakeholders. A key step will be to invest in early-stage refuelling infrastructure, which will enable pilot initiatives, build confidence, and encourage freight operators to invest in vehicle technology.

Alberta's Hydrogen Highway

Alberta stakeholders are developing a regional, ecosystem-based approach to the introduction of hydrogen-powered heavy-duty trucking.

The Alberta Motor Transport Association is leading the Alberta Zero Emission Truck Electrification Collaboration (AZETEC), which will design, manufacture, and test hydrogen-powered Class-8 trucks. AZETEC contributes to the Edmonton Region Hydrogen Hub, Canada's first hydrogen hub established by Edmonton Global, the regional economic development agency. The hub's strategy involves developing a roadmap to put 5,000 hydrogen vehicles on Western Canadian roads.³⁹

Key to realizing this strategy is constructing hydrogen refuelling infrastructure in strategic locations, which will enable early adopters to pilot and experiment with hydrogen vehicle technology. The first step is to develop a refuelling network along Highway 2, which connects the Edmonton and Calgary regions. Calgary's launch of its hydrogen hub in March 2025 brings this refuelling network closer to reality. As in British Columbia, this will require a public-private partnership supported by public risk capital. In B.C., the Canada Infrastructure Bank (CIB) is working with HTEC to develop production and refuelling infrastructure. In Alberta, the gas producer Air Products is exploring a similar arrangement for Highway 2.

³⁷ Bear Head Energy, "We Plan to Produce Green Hydrogen & Ammonia at Scale."

³⁸ Sahin, Habip, "Hydrogen refueling of a fuel cell electric vehicle."

³⁹ The 5000 Hydrogen Vehicle Challenge, "VAZETEC launches first heavy-duty Class 8 FCEVs."

A Northern corridor

Investing in trade-related transportation infrastructure in the North serves three major national priorities.

First, investing in Northern Canada can advance efforts toward reconciliation. Lower-quality infrastructure in Canada's territories contributes to per-mile trade costs that are 45 per cent higher than in the provinces,⁴⁰ and many Indigenous communities across Northern Canada rely on a single sealift each summer to secure construction materials, equipment, fuel, dry goods, and other essential supplies.⁴¹ High costs and uncertainty worsen challenges related to food security, housing, and healthcare—in 2017, the Auditor General of Canada reported that a Nunavut air carrier had to delay or cancel 29 per cent of its 1,250 medical emergency evacuations due to inadequate airport infrastructure.⁴²

Second, investing in the North is essential if Canada wants to realize opportunities in the critical minerals sector. Canada's 2023 Critical Minerals Strategy emphasizes the untapped potential of Northern mineral deposits, and investing in road and maritime infrastructure is key to unlocking many of these opportunities. Since Diefenbaker's Roads to Resources program in the 1950s and '60s, Canada has envisioned a thriving Northern mineral economy. For investors, the time to realize this opportunity is now.⁴³

Third, investing in the North is critical to securing Canadian sovereignty in the Arctic. International interest in Arctic resources and waterways continues to grow. Canada needs to better establish its presence in the region, and investing in trade-related infrastructure is an essential first step.⁴⁴

In 2016, researchers at the University of Calgary developed the concept of a "Northern corridor," envisioned as a multi-modal corridor that would use pre-established rights-of-way to streamline project approvals across Canada's North. In 2025, the researchers published a more community-centred update to their work, in which they recommend engaging with communities and other levels of government to identify regional infrastructure priorities. These priorities are then integrated into a regionalized national strategy that can guide transportation infrastructure development over the long term.⁴⁵

While there is little evidence that integrated corridor planning has taken root, our engagement nevertheless found growing momentum around a suite of strategic projects that together address many of the objectives articulated through the corridor concept. We see these projects as a backbone for continued corridor planning.⁴⁶

Mackenzie Valley Highway

The Government of the Northwest Territories' (GNWT) 2015 long-term transportation plan, *Connecting Us*, identifies three key economic corridors as development priorities.⁴⁷ The first is the Mackenzie Valley Highway, which has been a priority for the region since Diefenbaker's 1958 Roads to Resources Program.



40 Fellows and Tombe, "Gains from Trade for Canada's North."

41 Transport Canada, *Transportation in Canada 2020*.

42 Office of the Auditor General of Canada, "2017 Spring Reports of the Auditor General of Canada."

43 Government of Canada, *The Canadian Critical Minerals Strategy*.

44 Lackenbauer and Koch, "Northern and Arctic Security and Sovereignty."

45 Fellows and others, "Northern Corridor Research Program."

46 Rodrigue, "Constraints in the Canadian Transport Infrastructure Grid."

47 Northwest Territories Department of Transportation, *Connecting Us*.

The project involves construction of a 320-kilometre all-season gravel highway from Wrigley to Norman Wells that would connect isolated communities, increase safety and economic growth, and stabilize the cost of living in the territory’s Dehcho and Sahtu Regions.⁴⁸ The Sahtu Secretariat, a regional land-claims organization representing Dene and Métis communities, released research in 2024 highlighting the highway’s importance to national defence and natural disaster relief.⁴⁹

The new highway would replace the existing Mackenzie Valley Winter Road, whose season has become shorter and less predictable due to climate change—temperatures in the territory have risen at twice the worldwide average since the 1940s.^{50,51} As such, it represents an adaptation of transportation infrastructure to a changing climate.

The GNWT has focused on completing small portions of the Mackenzie Valley Highway over time while seeking federal funding to complete the project in full—advancing toward a strategic priority first envisioned in 1958 to extend an all-season road through the territory to the Arctic Coast.⁵²



Slave Geological Province Corridor

The second priority identified in *Connecting Us* is the Slave Geological Province (SGP) Corridor. This corridor seeks to provide all-season road access through one of Canada’s most promising mining regions. SGP and the Grays Bay Road and Port Project discussed below are parts of the same infrastructure initiative. For simplicity, they are discussed independently.

The SGP spans approximately 190,000 square kilometres across the eastern Northwest Territories and western Nunavut.⁵³ There are three active diamond mines in the region currently serviced by the Tibbitt–Contwoyto Winter Road⁵⁴ and known deposits of gold and critical minerals including copper, cobalt, lithium, rare earth elements, nickel, and graphite.^{55,56}

The SGP Corridor project involves the construction of a 413-kilometre, all-season gravel road from Tibbitt Lake, just north of Yellowknife, northeast to the border of Nunavut.⁵⁷ With an initial cost estimate of \$1.1 billion in 2019,⁵⁸ the GNWT anticipates that the corridor will yield benefits that include increased safety and reliability while reducing costs for mining exploration, development, operations, and transportation of goods to market.^{59,60}

When joined to the Grays Bay Road and Port Project, the corridor will also provide a vital connection to new potential export facilities.

48 Northwest Territories Department of Infrastructure, “Mackenzie Valley Highway.”

49 Sahtu Secretariat Inc., *Securing Canada’s Link to the Arctic*.

50 Mackenzie Valley Environmental Impact Review Board, *Mackenzie Valley Highway Project*.

51 Government of Northwest Territories, “NWT Reports on Climate Action and Energy 2023-2024.”

52 Northwest Territories Department of Infrastructure, “Mackenzie Valley Highway.”

53 Canadian Northern Economic Development Agency, “Development of the Slave Geological Province.”

54 Northwest Territories and Nunavut Chamber of Mines, “Mines Actively Producing in the NWT and Nunavut.”

55 Northwest Territories Geological Survey, “New Reports on Slave Geological Province.”

56 Northwest Territories and Nunavut Chamber of Mines, *Northern Mining News*.

57 Tredinnick, “NWT seeks federal funding commitment.”

58 Northwest Territories Department of Infrastructure, “Slave Geological Province Corridor.”

59 Northwest Territories Department of Infrastructure.

60 Government of the Northwest Territories, *Connecting to Opportunities*.

Grays Bay Road and Port Project

Grays Bay is located in the Kitikmeot Region of Nunavut. It sits in the Northwest Passage in Coronation Gulf between Victoria Island and mainland Nunavut. The Grays Bay Road and Port project aims to build the first port in the western Canadian Arctic, with two deep-water wharfs capable of accommodating post-Panamax-class ships.⁶¹ The site would also include an airstrip, transloading facilities, and warehousing.⁶²

The project also involves construction of a 230-kilometre all-season road that would connect the port to the northern end of Tibbitt–Contwoyto Winter Road. A second phase would continue the road 95 kilometres south to the border of the Northwest Territories, to link up with the proposed SGP Corridor and connect to the rest of Canada.⁶³

First proposed by the Government of Nunavut and the Kitikmeot Inuit Association in 2016, the project is now led by West Kitikmeot Resources Corp., which is majority-owned by the Kitikmeot Inuit Association.⁶⁴

The Grays Bay Road and Port project promises several benefits. First, it can lower business costs and attract investment to the region, unlocking promising critical mineral deposits, including zinc and copper deposits at the Izok, High Lake, Hood, and Hackett River sites. Impact analysis suggests the project could increase Canadian GDP by over \$7 billion.⁶⁵

West Kitikmeot Resources Corp. is also positioning the Grays Bay port as a key Arctic security asset. Positioned between the Port of Nome in Alaska and the Port of Nuuk in Greenland, the facility could act as a hub for naval patrols in the western Arctic and reinforce Arctic sovereignty.⁶⁶

Port of Churchill and Port Nelson

Churchill sits on the western shore of Hudson's Bay in northern Manitoba. It is connected to the rest of Canada by the 1,300-kilometre Hudson Bay Railway, which links Churchill to The Pas.



The Port of Churchill has been operating since the early 1930s, primarily shipping grain under the authority of the Canadian Wheat Board.

In 1997, the port and railway were sold to the private company OmniTRAX. OmniTRAX later abandoned the assets in 2016, allowing the railway to degrade following a major flood in 2017. In 2018, the assets were sold to the Arctic Gateway Group, a partnership of 41 First Nations and “Bayline” communities.⁶⁷

Expanding the Port of Churchill provides an opportunity to strengthen Canada's position in the Arctic and improve Prairie access to European markets. The Arctic Gateway Group plans to focus on shipping grain, fertilizer, and critical minerals. A first shipment of zinc concentrate went through the port in the summer of 2024.⁶⁸

61 The Maritime Executive, “Canada Makes Progress.”

62 Weber, “Long-awaited Arctic port and road project.”

63 Blake, “Company restarting environmental assessment of Grays Bay project.”

64 Sarkisian, “Grays Bay road and port could be open by 2035.”

65 Nunavut Department of Economic Development and Transportation, “The Grays Bay Road and Port.”

66 West Kitikmeot Resources Corp., “Arctic Security Corridor.”

67 Kavanagh, “Northern group signs deal to buy Port of Churchill and rail line.”

68 Fish-Robertson, “Critical minerals milestone for Port of Churchill.”

The Port of Churchill has the potential to function as an eastern hub in a new Canadian Arctic corridor, while also supporting economic development in northern Manitoba. But the proposal faces challenges as well. The shipping season in Churchill remains relatively short, and melting permafrost makes upgrades to the rail line challenging.

A potential complement (or alternative) to Churchill is the First Nations-led NeeStaNaN Corridor proposal. The overall vision for the project would see a corridor link all the way to Alberta. The eastern portion, however, would extend the Hudson Bay Railway west from Gillam, where the current route heads north towards Churchill. And rather than link to the Port of Churchill, the NeeStaNaN corridor would develop port infrastructure in Port Nelson, also on Hudson Bay. But because Port Nelson is several hundred kilometres further south, the port facility could operate year-round.⁶⁹ In April 2025, the Premier of Manitoba indicated interest in developing a second Hudson Bay port on the Nelson River.⁷⁰



Ring of Fire

The Ring of Fire region lies approximately 500 miles north of Thunder Bay and contains some of Canada's richest mineral deposits, including major deposits of chromite, copper, and nickel. These deposits are valued in the tens of billions of dollars, and unlocking access to the region is a key part of Ontario's long-term strategy for electric vehicles and battery development. As of May 2025, the provincial government has committed close to \$1 billion for legacy infrastructure in the region.⁷¹

Key to developing the Ring of Fire is working with Indigenous communities to secure and maintain their free, prior, and informed consent—in part by ensuring they benefit from increased economic development activity. The Government of Ontario has signed community development agreements with Marten Falls and Webequie First Nations and the Aroland First Nation. These agreements are designed to ensure that communities have the social infrastructure needed to support growth, including health facilities, recreation centres, and labour force development programs.⁷²

As part of these broader development agreements, the Marten Falls and Webequie First Nations are leading a proposal to construct a series of supply roads: the Webequie Supply Road, the Marten Falls Community Access Road, and the Northern Link Road. The Aroland First Nation is supporting a proposal to develop the complementary Anaconda and Painter Lake roads.⁷³ However, while Aroland First Nation supports road access for neighbouring Marten Falls First Nation, Chief Sonny Gagnon has made clear that does not equate to consent for mining the Ring of Fire. The Chief instead points to the regional assessment currently being co-led by 15 Ontario First Nations as an essential step to complete before turning to decisions about the use of this infrastructure for mining operations.^{74,75}

69 NeeStaNaN, "Overview."

70 Polczer, "Manitoba embraces second Arctic port."

71 Public Policy Forum, "What are critical minerals and the Ring of Fire?"

72 Government of Ontario, "First Nations and Ontario One Step Closer to Building All-Season Roads."

73 Link2Build Ontario, "Ontario and Aroland First Nation sign agreement."

74 Casey, "2 First Nations working on roads to Ring of Fire speak out."

75 Woodward & Company Lawyers LLP, "Northern Ontario First Nations."



Key takeaways

By way of conclusion, we end with several key takeaways that emerged during our research and stakeholder engagements.

The projects identified throughout this report tell a story about where Canada's trade network is headed and the considerations decision-makers need to keep front and centre as they develop a long-term roadmap for the system. To transform the network that exists today into the one we need for tomorrow, public and private sector decision-makers need to think in new and innovative ways about Canada's trading future.

Trade diversification is informing project priorities

Diversifying Canada's trade relationships is an urgent strategic priority. This reality can be clearly seen in the projects highlighted in this research. While some projects reflect traditional Canadian trade patterns with the United States, many others are clearly oriented toward a more diverse export future.

The emphasis on Canada's port network especially speaks to the need to grow Canadian market share in Europe and Asia. Combined with expanded Northern development and the cultivation of new product markets like critical minerals and hydrogen, Canada can move the needle on diversification. But this will take sustained effort and a long-term vision.

Ecosystem approaches are key to bringing new technologies to market

Public-private collaboration plays a central role in creating projects, particularly when it comes to deploying new technology.

The development of hydrogen refuelling infrastructure for heavy-duty trucking is hindered by a classic chicken-and-egg problem. Trucking companies cannot invest in new vehicle technology before refuelling infrastructure is in place, but it is difficult to justify investments in refuelling infrastructure before there are a significant number of vehicles on the road.

To overcome this challenge, in both British Columbia and Alberta, stakeholders have developed an ecosystem-based approach, bringing together vehicle manufacturers, trucking associations, hydrogen producers, fuel infrastructure operators, and regional economic development institutions to coordinate pilot programs and early-stage infrastructure. CIB has played a central role by providing much-needed risk capital.

This regional ecosystem-based approach is spurring some to start thinking about the future of a national refuelling network. Expanding beyond these regional initiatives will prevent the creation of new internal trade barriers. Imagine, for example, a future in which hydrogen refuelling infrastructure is robust in Alberta but underdeveloped in Saskatchewan. Public capital, and in particular risk capital from financial institutions, will be key in scaling up these regional approaches.

Network resilience and redundancy are vital

Building greater resilience and redundancy into Canada's supply chain will help overcome risks related to over-reliance on single ports of access. While not all forms of disruption can be addressed through infrastructure (for example, labour disruptions), strategic infrastructure investments can contribute to resilience in a variety of ways.

The value of Nanaimo's Duke Point expansion, for example, is related in part to its ability to improve the resilience of the Pacific gateway. The project can create additional capacity at times when the Port of Vancouver is especially congested, but it would also insulate Vancouver Island's supply chain in the event of a major disaster.

There is also an urgent need to address infrastructure assets that are especially vulnerable to the impacts of climate change. The Mackenzie Valley Highway, for example, is essential in part because the existing winter road is becoming less reliable as temperatures warm.

Canada needs to mobilize regional infrastructure

Canada possesses a wealth of regional infrastructure, including port facilities, airports, and rail lines. In recent decades, Canada has focused on building capacity across the primary infrastructure network (primary ports, like the Port of Vancouver, and the mainline rail network). This research points to the need to reinvest in secondary regional infrastructure, which can act as critical complements to the primary network.

Inland ports provide intermodal efficiency and optionality

As demonstrated by the project examples, inland ports can increase intermodal efficiency and transshipment, particularly from truck to rail, which also reduces emissions per tonne-mile. Inland ports can also relieve the pressure and congestion surrounding maritime ports and introduce route flexibility, which gives shippers much-needed optionality.

Canada should build with pace and prudence

Windows of opportunity for trade infrastructure investments are finite. In recent years, with limited regulatory certainty for project proponents, capital investments have lagged network needs. Canada is confronting a seismic shift in the economic and geopolitical landscape, driven largely by trade tensions with the United States. This warrants a mission-critical approach to trade diversification and infrastructure deployment. However, elevating our trade network is a long game. Meaningful consultations with Indigenous rights holders and other communities will be indispensable to our success. Canada must strike this delicate balance to secure the future of the network.

The path forward

Several questions relevant to the future of Canada's trade infrastructure network emerged from this research. A few are listed below:

- How can Canada accelerate nation-building trade infrastructure while balancing economic, environmental, and Indigenous interests?
- What project development and financing models are best positioned to deliver transformative trade infrastructure projects?
- How do we improve trade network efficiency and reduce freight emissions in a manner that bolsters industrial policy at the national and provincial-territorial levels?
- How can we leverage data and artificial intelligence to elevate our trade network and deliver the desired system-level performance?

These questions and others will be important considerations as Canada seeks to build a trade network that is responsive to our current challenges and aligned with our ambitions.

Appendix A

Methodology

This research was carried out in four phases. In the first phase, the research team undertook a review of 43 federal and provincial–territorial strategy documents introduced or modified between 2008 and 2024. We identified any objectives related to trade-related transportation infrastructure and, based on this review, developed a multi-criteria methodology to categorize projects according to four themes:

- productivity, bottlenecks, and network efficiency
- developing new product markets, with a special focus on hydrogen and critical minerals
- Northern development
- mitigating and adapting to climate change

In the second phase of research, we launched a national project nominations portal in April 2024. We sent out a call to over 325 stakeholder groups, inviting them to tell us about projects they felt could move the needle on the strategic priorities we identified.

In identifying stakeholders, we prioritized broad representation of regional and sectoral views. In addition to government ministries from each province and territory, we distributed the nominations portal to academics, airport and port authorities, railways, trucking associations, chambers of commerce and boards of trade, shipping and logistics providers, and industry associations representing key economic sectors, including mining, agriculture, manufacturing, and fuels.

For the third phase of the project, we conducted interviews with 36 trade transportation network stakeholders between May 2024 and October 2024. We asked stakeholders to tell us about project priorities that they felt could move the needle in relation to our four transformative themes.

Overall, we reviewed and categorized close to 50 individual projects. The projects discussed in this paper are those that demonstrated a strong connectivity with our criteria for transformative infrastructure projects.

In the fourth phase, we hosted two stakeholder events in October 2024: a leadership roundtable and a workshop. The roundtable and workshop brought together 137 stakeholders and provided another opportunity to discuss network challenges and high-impact project opportunities. These stakeholders included representatives from port authorities, railway companies, trucking associations, airport authorities, manufacturers, mining companies, agrifood companies, logistics companies, hydrogen hubs, Indigenous project developers, Indigenous economic development organizations, chambers of commerce and boards of trade, federal and provincial governments, and financial institutions. The insights generated at the roundtable and workshop informed this research report.

Appendix B

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- **Steven Robins**, Head of Strategy, Canada Infrastructure Bank

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Corridors of Prosperity: Transforming the Future of Canada's Trade Infrastructure Network

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