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The Road to Dependability:

A contextual analysis of Western Canada's role as a reliable trade partner

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This report was written by Stephany Laverty, Senior Policy Analyst at the Canada West Foundation.

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Canada is at an inflection point on trade, so forward-focused conversations like the one that took place at our roundtable will help us forge the path into the future.

We could not put on events like this without partners. We would like to offer a special thanks to our hosts, Bennett Jones, and to our moderator, Gitane De Silva, for skillfully guiding the conversation.

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Introduction

Western Canada finds itself at a pivotal moment. Lingering economic effects of the pandemic, the Russian invasion of Ukraine, tensions in the Middle East, a U.S.-driven global trade war, and emerging threats to Canadian, Greenlandic, and Panamanian sovereignty have reshaped how the region and the world approach trade. Against this backdrop, the G7 Leaders' Summit, held in June in Alberta's Kananaskis region, featured a robust agenda focused on issues such as trade barriers and energy exports.

Building on renewed global attention to trade and energy, the Canada West Foundation convened its annual Hon. James A. Richardson Discovery Roundtable, honouring one of our organization's founders, to focus on key issues facing Western Canadian exporters. As global markets shift and our reliability as a trade partner is questioned, Western Canada can take the lead in charting a bold path to restore trust and expand our national and international presence. The world wants our resources and our innovation; we need to find ways to deliver it effectively.

To search for resolutions to trade challenges with the G7, the Roundtable brought together executives representing Western Canada's largest industries and trade and transport interests alongside international representatives to ask the question:

How can western Canadian industries diversify effectively to meet global demand and reassert themselves on the world stage?

There are clear signals from the European Union and others that they want to do more business with Canada. Additionally, many products they need come from the West, such as critical minerals, agricultural products and energy resources.

Roundtable participants recognized that there was a limited window of opportunity to garner national support to take necessary actions to make Western Canada a dependable supplier of these essential resources to the rest of the world. The thematic factors related to reliably exporting of each of these resources included infrastructure, investment, regulatory, environment, and Indigenous engagement.

With all of this in mind, the following analysis expands on June's roundtable discussion, the results of which are in *What we heard: The Road to Dependability* report at www.cwf.ca, and takes an in-depth look at the critical mineral, agriculture and energy sectors to unpack the western Canadian context. The report highlights key findings for opportunities and barriers to developing these resources so that Canadian and G7 policymakers can have a better understanding of the nuances of Western Canadian production as the region looks to become a reliable supplier and partner.

Critical Minerals

Key findings:

- Foreign direct investment (FDI) is currently limited with national security restrictions on investment. While the federal government leads on national security issues, there is an opportunity to explore investment partnerships with allied nations and industry counterparts which aligns with broader defence and procurement commitments.
- Royalty regimes and investment opportunities can help grow and accelerate Indigenous ownership and partnerships in the sector, but more research is needed to understand how government can best support initiatives.
- Federal and provincial governments can provide scale up and growth supports for junior mining companies particularly in the prairies where companies are still in the research and development stage.
- The federal government's recent announcements to include mining infrastructure in British Columbia and northern Saskatchewan on the major projects list is encouraging. These investments support modernizing and expanding existing infrastructure in B.C. while creating new opportunities for those from mining communities in northern Saskatchewan and Manitoba.
- Similar to energy, historical experience and processes which do not respect affected Indigenous communities are unlikely to be successful.

Western Canadian context

Western Canada is a source of at least 30 of the 34 critical minerals listed in Canada's critical minerals strategy. Most of this potential is unrealized, as some of these materials are by-products of efforts to extract other resources. For example, brines from the oil and gas sector often contain lithium. E3 Lithium (a Canadian company focused on lithium extraction) estimates that Alberta's Garrington District, which extends from southern Edmonton to Sundre, contains 5.0 million tonnes of "lithium carbonate equivalent."[1] For products mined in larger quantities for export, Western Canada typically exports the raw product and processing capacity is limited.

[1] Business Wire. "E3 Lithium outlines an inaugural measured and indicated mineral resource estimate of 5.0 Mt LCE for the Garrington District," *Yahoo Finance*, June 25, 2025. https://finance.yahoo.com/news/e3-lithium-outlines-inaugural-measured-074000848.html

On the federal government's 2024 Major Energy and Natural Resources Projects Inventory list,[2] there are currently 104 mining projects valued at approximately $83 billion.[3] Most of these are situated in Western Canada and have the highest total cost ($42 billion) and the highest average cost per project ($920 million/project) when compared to those in the Centre Canada, Atlantic and North regions. These higher costs offer some insight into why a common concern is mining investment. Western Canada may be more exposed to investment pressures in an industry that is heavily reliant on investment capital.

Table 1

Planned Mining Projects – National Major Projects Inventory[4]

	Count	Total Capital Cost ($)	Capital Cost/Project ($)
Western Canada	46	~42 billion	~920 million
Central Canada	35	~27 billion	~762 million
Atlantic	14	~7 billion	~490 million
North	9	~7 billion	~742 million

Source: CWF calculations, Natural Resources Canada projects inventory

Table 2

Under Construction Mining Projects – National Major Projects Inventory[5]

	Count	Total Capital Cost ($)	Capital Cost/Project ($)
Western Canada	8	~16 billion	~2 billion
Central Canada	14	~11 billion	~820 million
Atlantic	1	~534 million	~534 million
North	1	~610 million	~610 million

Source: CWF calculations, Natural Resources Canada projects inventory

In the joint statement on critical minerals, that came out of the 2025 G7 Summit, the group committed to "mobilizing capital and investing in partnerships,"[6] which is welcome news. It could be leveraged to build Canadian and western Canadian capacity in both scale up and commercialization of critical minerals, and mid- and downstream processing and refinement capacity for mutual benefit. The Italian and EU statements further emphasize critical mineral partnerships, so the opportunity for Western Canada is in turning interest and promises of collaboration into industry action and investment.

[2] This list is not the same as the nation building projects list under the newly established Major Projects Office. Natural Resources Canada administers the inventory list which includes energy and natural resources projects with a minimum capital cost of $50 million.
[3] Government of Canada. "Open maps: Major project inventory," n.d. https://search.open.canada.ca/openmap/f5f2db55-31e4-42fb-8c73-23e1c44de9b2
[4] Ibid, Canada West Foundation calculations
[5] Ibid
[6] G7 Leaders. "G7 Critical Minerals Action Plan," June 17, 2025. https://g7.canada.ca/assets/ea689367/Attachments/NewItems/pdf/g7-summit-statements/minerals-en.pdf

Infrastructure

The federal government introduced the Critical Minerals Infrastructure Fund (CMIF) in 2023 with $1.5 billion in funds to be allocated to Indigenous grant programs or contribution funding to support "preconstruction activities and shovel-ready infrastructure projects."[7] As of March 2025, the federal government reports that $303 million in funding has been allocated for 25 preconstruction and six shovel-ready projects. For Indigenous projects, $1.5 million has been allocated to date for 18 projects.[8]

The majority of the Indigenous grant projects are concentrated in Manitoba with a total of seven projects and $525,000 in funds. Ontario has the most contribution-funded projects with 11 total, but British Columbia has the largest amount of grant dollars at $163 million with seven projects. Saskatchewan and Alberta have the fewest funded projects outside of the Atlantic region. Alberta has a critical mineral strategy but is in the exploratory and development phase.[9] Saskatchewan has already established infrastructure for those minerals it leads in global production, such as potash and uranium, but is still at the exploratory and scale-up phase for others.[10] British Columbia, Manitoba, Ontario and Quebec have longstanding, traditional mining industries and may have infrastructure that is ready for improvement or expansion for critical minerals.

Investment

Investment capital in projects can come from multiple sources, including the companies that own them, "global equity markets, foreign-state owned entities and sovereign wealth funds."[11] The federal government has incentives to support those who are self-investing through the Mineral Exploration Tax Credit, which is a 15 per cent tax credit aimed to "finance early stage 'grassroots' mineral exploration."[12] The federal government has also created the Critical Mineral Exploration Tax Credit which provides a non-refundable 30 per cent tax credit for 15 critical minerals and includes lithium extraction from brines.[13]

Foreign investment in Canada is challenging as critical minerals are essential for defense manufacturing. China dominates in critical mineral investment and production as they own significant assets across the global supply chain. For Canadians looking to grow their industries, it can be difficult to compete in such a volatile market which is subject to political fluctuations.

[7] Government of Canada. "Critical minerals infrastructure fund," July, 2025. https://www.canada.ca/en/campaign/critical-minerals-in-canada/federal-support-for-critical-mineral-projects-and-value-chains/critical-minerals-infrastructure-fund1.html

[8] Ibid

[9] Cook, Diane L.M. "Status of the critical strategic minerals industry in Alberta," *Canadian Mining Journal*, August 28, 2024. https://www.canadianminingjournal.com/featured-article/status-of-the-critical-strategic-minerals-industry-in-alberta/

[10] Ugochukwu, Albert I. "Canada's Critical Mineral Strategy: Opportunities and challenges for the development of critical mineral supply chain in Saskatchewan," January 5, 2024. https://www.schoolofpublicpolicy.sk.ca/research-ideas/publications-and-policy-insight/policy-brief/critical-mineral-strategy.php

[11] RBC Thought Leadership. "Critical capital: How Canada can tap foreign investment for its mineral riches," May 26, 2025, para. 17. https://www.rbc.com/en/thought-leadership/uncategorized/thought-leadership/critical-capital-how-canada-can-tap-foreign-investment-for-its-mineral-riches/

[12] Department of Finance. "Government extending support for mineral exploration in Canada," *Government of Canada*, March 3, 2025, para. 6. https://www.canada.ca/en/department-finance/news/2025/03/government-extending-support-for-mineral-exploration-in-canada.html

[13] Natural Resources Canada. "Tax incentives for mining and exploration," *Government of Canada*, March 20, 2025. https://natural-resources.canada.ca/minerals-mining/mining-policy-taxation-industry/mining-taxation/mining-specific-tax-provisions

The federal government has taken measures to prevent China and other foreign states from investing in or owning Canadian critical mineral assets. Three Chinese investors were ordered to divest from Canadian-owned lithium companies in 2022 as regulations tightened, given the government's focus on critical mineral assets and security. These companies were still in the exploration state and not yet in production and, in some cases, the mines were in other countries but had Canadian ownership.[14] This represented a significant shift for an industry that is heavily reliant on foreign investment and ownership.

Canada's historical ally, the United States, has been a close partner on critical mineral investment and development within Canada. In 2020, the two countries agreed to the Canada-U.S. Joint Action Plan on Critical Minerals Collaboration.[15] The United States has co-invested in critical minerals in Canada with the federal government to support infrastructure projects under the CMIF.[16]

With President Trump's threats to Canadian sovereignty over the country's resources and trade war, there is renewed interest in strategic partnerships with other allies and defence partners. Canada and the European Union previously entered a critical minerals strategic partnership and following June's G7 critical minerals statement and the EU joint statement, there is now opportunity for further cooperation.

From the European perspective, the barriers to Canadian partnership lie partly in investment as Chinese investment and ownership is present in European companies. If European companies were to restrict Chinese investment, there would be insufficient capital in the short term to offset the loss. Creating new tax incentives and identifying other measures to grow the domestic sector through junior mining companies could support more self-sufficient industry in the medium- to long-term. Canadian partnership can also support mutual industry growth as there are opportunities for collaboration, financial investment and joint supply chain development.[17]

Regulation

Finding investment to fund projects and fluctuating market conditions are key challenges for the mining sector.[18] Mining projects, unlike pipeline or other linear infrastructure projects, typically fall within provincial or territorial borders but touch on a range of areas under either federal or provincial authority or a mix of both. Navigating the blend of federal and provincial regulatory authorities is an oft-cited regulatory barrier. This blend often means projects need to meet both provincial and federal regulatory standards and go through two approval processes.

In March 2025, Prime Minister Mark Carney promised "to eliminate federal duplicative requirements by recognizing provincial assessments for major projects" and work toward "one project, one review."[19] If the promise holds true, there could be more regulatory certainty for the industry that can help attract investors.[20] Shorter approval timelines also help reduce the risk of changing market conditions that have also led to projects being delayed or terminated.

[14] Riley, Beth, Joshua Chad, Dr. A. Neil Campbell, and Sasa Jarvis. "Foreign investment in Canada: Minerals are critical and Annual Report released," *McMillan*, November 7, 2022. https://mcmillan.ca/insights/foreign-investment-in-canada-minerals-are-critical-and-annual-report-released/

[15] Natural Resources Canada. "Canada and U.S. finalize joint action plan on critical minerals collaboration," *Government of Canada*, January 9, 2020. https://www.canada.ca/en/natural-resources-canada/news/2020/01/canada-and-us-finalize-joint-action-plan-on-critical-minerals-collaboration.html

[16] Natural Resources Canada. "Canada and United States co-invest to unlock critical minerals development in Yukon," *Government of Canada*, December 13, 2024. https://www.canada.ca/en/natural-resources-canada/news/2024/12/canada-and-united-states-co-invest-to-unlock-critical-minerals-development-in-yukon.html

[17] Carry, Inga. "Critical Raw Materials Partner Canada: An (almost) Perfect Match," *SWP Comment*, July 2024. https://www.swp-berlin.org/publications/products/comments/2024C29_CriticalRawMaterialsPartnerCanada.pdf

[18] Mining.Com. "Economics, not regulation, the main reason behind delay in British Columbia's mines, study shows," December 11, 2024. https://www.mining.com/economics-not-regulation-the-main-reason-behind-delay-in-british-columbias-mines-study-shows/

[19] As cited in McClelland, Colin. "Canada scraps federal review of major infrastructure and mining projects," *Mining.com*, March 23, 2025, para. 2.

[20] Hunter, David, Bernard Roth and Mary Su. "Unlocking Canada's mining potential," *Canadian Mining Journal*, April 23, 2025, https://www.canadianminingjournal.com/featured-article/unlocking-canadas-mining-potential/

While mines have direct environmental impact in terms of pollution and emissions, the minerals they produce are essential.

Environment

Mining has significant impacts and implications for the climate and environmental commitments that the G7 has previously made. While mines have direct environmental impact in terms of pollution and emissions, the minerals they produce are essential. To help meet those goals and minimize the risk of mining, Canada led the creation of the Sustainable Critical Minerals Alliance (SCMA) alongside Japan, Australia, the UK, U.S., France and Germany and, in 2024, Sweden.[21] The SCMA "promotes the global uptake of mining, processing and recycling that is responsible, environmentally sustainable and socially inclusive."[22]

The Commissioner of the Environment and Sustainable Development's audit of the Critical Minerals Strategy found that Natural Resources Canada (NRCan) "did not do enough analysis to measure the benefits of increasing Canada's supply of critical minerals versus [the impacts]."[23] The Commissioner also recommended that NRCan should "fully assess the strategy's risks and impacts [...] to help maximize the strategy's benefits while minimizing any adverse effects."[24]

Canadian researchers have developed solutions. For example, quantum technology[25] has shown promise in speeding up mineral processing. The use of specialized lasers instead of traditional electron microscopes "moves minerals analysis from the lab to the field, speeding up the process from days to minutes."[26] The shortened processing time speeds up the overall process, but also uses fewer chemicals, which lessens environmental impact.[27] Some mines are also using solar panels and wind turbines to power certain aspects of production or using electric vehicles where possible to lower site emissions.

When companies look to incorporate these technologies into existing mines, they may need to redo or obtain new permits. While these improvements may help to make more sustainable production, they can create delays as regulators also adjust and assess the effect of these technologies. Development of these technologies also takes significant investment and may require more government support through incentives such as tax credits.

[21] Mining Technology. "Sweden pledges to Sustainable Critical Minerals Alliance," June 28, 2024. https://www.mining-technology.com/news/sweden-sustainable-critical-alliance/?cf-view

[22] International Energy Agency. "Sustainable Critical Minerals Alliance," December 8, 2023, para. 3. https://www.iea.org/policies/17635-sustainable-critical-minerals-alliance

[23] Auditor General of Canada. "The Canadian Critical Minerals Strategy," *Independent Auditor's Report*, 2024, p. iii. https://www.oag-bvg.gc.ca/internet/docs/parl_cesd_202411_06_e.pdf

[24] Ibid.

[25] These technologies use "the unique features of quantum mechanics to perform tasks in fundamentally new ways. Unlike classical technologies, which rely on binary states of 0s and 1s, quantum technologies exploit quantum phenomena [...] to perform tasks that are impossible for classical systems to do." https://www.techtarget.com/searchcio/definition/What-is-quantum-technology-Use-cases-and-future-implications, para. 3.

[26] National Research Council Canada. "From the mine to your battery: Quantum technology speeds up critical mineral extraction," *Government of Canada*, July 10, 2025. https://nrc.canada.ca/en/stories/mine-your-battery-quantum-technology-speeds-critical-mineral-extraction

[27] Ibid

[28] Kent, Cory, Andjela Sabet, Martin Thiboutot and Jia Hwang. "Mining meets sustainability: Challenges in renewable energy integration," *Canadian Mining Journal*, January 28, 2025. https://www.canadianminingjournal.com/featured-article/mining-meets-sustainability-challenges-in-renewable-energy-integration/

Indigenous engagement

As mining projects often occur near or on First Nations communities and territories, Indigenous communities are board members, owners and employees of mining operations or involved in similar capacities with support industries such as construction or transportation. For Indigenous communities, there are essential elements that must be included to move projects forward. The First Nations Major Projects Coalition held two roundtables on First Nations inclusion in the critical minerals sector and found that success relies on:

- Early First Nations inclusion in decision-making on all critical mineral projects along the supply chain, and the resources and capacity to do so.
- First Nations equity ownership and/or partnerships on all critical mineral projects along the supply chain, and the resources and capacity to do so.
- The requirement of free, prior and informed consent from First Nations governments and their membership on all critical mineral projects along the supply chain, and the resources and capacity to do so.[29]

For those communities that are developing projects, NRCan's Indigenous Natural Resources Partnership Program provides funding to Indigenous natural resource projects, including critical minerals projects.

Table 3

NRCan Indigenous Natural Resources Partnership Program – Critical minerals or multi-sector funded projects in Western Canada

	Total Count	Total Amount
British Columbia	3	~18 million
Alberta	1	480,000
Saskatchewan	2	~923,000
Manitoba	-	-
Northwest Territories	1	5 million
MB, SK & AB	1	~353,000

Source: CWF calculations, Natural Resources Canada INRPP Projects

NRCan also tracks agreements between Indigenous communities and mining companies. For critical minerals specifically, Western Canada has the most signed agreements, 67 of 146, followed by the northern territories, 29. It is important to note that there are a variety of different types of agreements depending on the stage, type of project, needs of the proponents and communities and how the community "structure their business and economic interests."[30]

[29] Von der Porten, Dr. Suzanne, Sage Williams and Jesse McCormick. *Critical Mineral Roundtables*. First Nations Major Projects Coalition, 2023, p. 36. https://fnmpc.ca/wp-content/uploads/FNMPC_Critical_RT_Overview_06072023_final.pdf

[30] Yukon Chamber of Mines. "Project-specific exploration agreements," n.d. https://www.yukonmineralengagement.ca/bestpractice/subtopic/project-specific-exploration-agreements

For investment, the first Indigenous majority-owned mining royalty company also began in Canada.

Table 4

Indigenous Critical Mineral Mining Agreements – Canadian Regions for Active Projects

Western Canada	67
Central Canada	44
Atlantic	6
North	29

Source: CWF calculations, Natural Resources Canada Indigenous Mining Agreements

Developing these relationships are resource intensive as they take time and money. Organizations such as the First Nations Major Projects Coalition support communities and proponents in navigating all aspects of project development. For investment, the first Indigenous majority-owned mining royalty company also began in Canada. The Nations Royalty Corp., of which Nisga'a Nation owns 77 per cent, aims to provide a collective investment body for royalties paid to Indigenous communities. This body would allow communities to "pool their resources and increase their economic heft through economies of scale,"[31] allowing for the portfolio to be invested in other assets.

[31] Stephenson, Amanda. "Nisga'a Nation guides world's first mining royalty company that's majority Indigenous-owned," *CBC News*, November 18, 2024, para. 18. https://www.cbc.ca/news/canada/british-columbia/nations-royalty-mining-company-nisga-a-nation-bc-canada-1.7386290

Agriculture & Agri-Food

Key findings:

- Regulatory barriers to agri-food trade created by mandatory or voluntary country of origin labelling could be disputed through the WTO to protect market access for high-value and high-quality Canadian products.
- To increase and diversify agri-food and biofuel exports, a systematic upgrade and modernization of the supply chain from farm to destination is needed.
- Digital adoption can support more efficient and productive farms, but overcoming barriers to adoption requires resources – time, money, and research and development – and better understanding of the return on investment (ROI) for producers of all sizes.
- Evidence-based, future-focused water management strategies could support governments of all levels and water-dependent industries to understand short-term and longer-term availability. Development of emerging groundwater analytic tools can help model environmental and regulatory impacts on water levels.
- Investments for additional manufacturing and related infrastructure capacity could support processed food exports beyond the United States. Western Canadian production is currently geared towards commodity export rather than domestic processing and then export.

Western Canadian context

Western Canadian producers are on the frontlines of U.S. tariffs and feel the pressure when trying to fix equipment, obtain fertilizer, or "any other inputs,"[32] while also facing increased local demand for products. There is also more international demand for Canadian agri-food products, but interprovincial and international trade barriers prevent product from reaching both domestic and international markets. Adhering to a rules-based trade system can help maintain predictability and continued open market access. They also allow for disputes to be raised and give countries additional opportunities to voice their concerns over trade practices or policies that may be unfair.

[32] Karpa, Alex. "How Trump's tariffs are affecting one pig farmer in Manitoba," *CTV News*, June 25, 2025, para. 6.

Within Canada, Bill C-5, the *Free Trade and Labour Mobility Act*, aims to create a system of mutual recognition of provincial safety standards so products produced in one province can be sold in another.

In 2025, the G7 Farmers' Organizations released a joint statement, which effectively summarized the challenge facing not just Western Canadian producers but those around the world:

> *G7 farmers find themselves at the crossroads of numerous global challenges: maintaining productivity in the face of market instability, ensuring food security amid geopolitical uncertainty and adapting to climate imperatives without sacrificing competitiveness.*[33]

The statement underscores the need for urgent action on tariffs, reinforcement of rules-based trade, support for sectoral innovation and productivity, regulatory modernization and "realistic, science-driven and incentive-based climate policies."[34] The EU-Canada joint statement also reiterated the need for increased bilateral trade and specifically mentions the importance of "reduc[ing] barriers and strengthen[ing] agriculture and agrifood trade."[35] The statement also reaffirms the importance of rules-based trade and "respect for internationally agreed trade rules."

The World Trade Organization is the only place where certain types of complaints can be heard – such as export subsidies – so a functional WTO is essential for agriculture. This is particularly true for Canada as the country is an agricultural heavyweight but a geopolitical middle power, so it needs a venue to fight back against unfair trade practices.[36]

Within Canada, Bill C-5, the *Free Trade and Labour Mobility Act*, aims to create a system of mutual recognition of provincial safety standards so products produced in one province can be sold in another. Clarity is urgently needed on what this means for agrifood exports versus those internally traded within Canada. Currently, agrifood products must meet the same standards for export if they are to be traded interprovincially. With C-5, the federal government recognizes provincial safety standards are for the most part sufficient unless there is clear discrepancy. Some exporters have raised concerns that C-5 could cause some trade partners to revisit Canadian products if provincial standards become the export norm.[37]

For the roundtable, the most significant concern was the ability to scale up and grow the sector to meet increased demand, not just for food, but for reliable, secure export partners.

Infrastructure

Agriculture infrastructure needs are wide-ranging and complex, spanning the entire supply chain — from acquiring inputs for crop and livestock production to delivering goods to consumers. This paper will first examine infrastructure requirements for on-farm production and export. Processing and manufacturing are addressed in the investment section, given the parallel need for increased investment in these areas alongside infrastructure.

[33] G7 Farmers' Organizations. "Joint Statement by the G7 Farmers' Organizations," June 16, 2025, para. 2.
[34] Ibid, para. 10.
[35] Government of Canada and European Union. "Joint Statement: Enduring partnership, ambitious agenda," *Prime Minister of Canada*, June 23, 2025, Annex para. 5. https://www.pm.gc.ca/en/news/statements/2025/06/23/joint-statement-enduring-partnership
[36] Briere, Karen. "Fixing WTO seen as major benefit for agriculture," *The Western Producer*, March 7, 2024. https://www.producer.com/news/fixing-wto-seen-as-major-benefit-for-agriculture/
[37] Duggan, Kyle. "Internal trade bill could undermine rules for meat exports, industry warns," *Global News*, June 24, 2025. https://globalnews.ca/news/11259732/internal-trade-bill-c-5-meat-exports-standards/

Infrastructure Needs: Farm Production

Farm size, crop type and precipitation/water availability all affect irrigation levels. Western Canadian farms are typically larger and grow more water intensive crops such as legumes.[38] In 2022, Alberta comprised 70 per cent of all irrigated water usage in the country followed by B.C. at 15 per cent.[39] Alberta and B.C. also have the largest irrigated land area.[40]

Amid drought conditions on the prairies and increasingly variable weather conditions, governments are making investments in irrigation infrastructure. In 2024, Saskatchewan announced $1.15 billion for the Lake Diefenbaker Irrigation Project with construction expected to start in 2026.[41] In the same year, Alberta announced $19 million for the Irrigation Rehabilitation Program to upgrade existing infrastructure in each of the province's irrigation districts, while B.C. contributed $83 million towards agricultural water storage projects.[42, 43] At the same time, water projects to enhance access to clean water and improve water sewage are also essential and have received funding from each of the western Canadian provinces.

Given the challenges facing communities and producers, a more holistic strategy on critical water infrastructure is needed. Emerging analytical tools which better map groundwater levels and model out impacts of regulatory and environmental changes are incredibly useful. These tools can better support policymakers and industry to develop longer term water strategies which weigh these varying needs and help identify where projects could be most beneficial.[44]

With net zero initiatives, electricity consumption is expected to increase.[45] To build the grid system needed for the future, "utilities and governments must implement a variety of grid modernization policies and programs. These include advanced metering infrastructure (AMI), demand-side management and distributed energy resources."[46] Such projects also require significant investment as improvements are extensive and costly.[47]

Connectivity is important for "real-time transmission of large data sets [and for] GPS-guided machinery and sensor networks for monitoring crop health, soil conditions and equipment performance."[48] These technologies can support more efficient and more sustainable farming practices as inputs are targeted to reduce waste and environmental impacts.[49] While rural farms would have access to cellular coverage, broadband is less accessible. In 2025, 78.2 per cent of rural houses in Canada have broadband access while 97.5 per cent have 4G cellular coverage.

In the immediate term for farmers, the extent of digital adoption is due to "a multitude of factors" that includes "credit availability," while in the longer term "economic benefits have been a good predictor"[50] of adoption. While smaller farms are less likely to integrate technologies compared to medium and larger farms, technology can also help "reduce economies of scale" so small farms can compete on a more even playing field. Reaping these benefits requires upfront capital, education and local support for small-scale farmers.[51]

[38] Ansieta, Paola and Eleen Marzook. "Agricultural irrigation patterns in Canada from 2012 to 2018," *Environment Fact Sheets*, Statistics Canada, July 23, 2021.
[39] Statistics Canada Table 38-10-0239-01
[40] Statistics Canada Table 38-10-0241-01
[41] Government of Saskatchewan. "Creating food and economic security for a stronger Saskatchewan," *News Release*, March 14, 2024. https://www.saskatchewan.ca/government/news-and-media/2024/march/14/creating-food-and-economic-security-for-a-stronger-saskatchewan
[42] Zapata, Karina. "Province commits to irrigation infrastructure upgrades to 'do more' with dwindling water supply," *CBC News*, April 30, 2024. https://www.cbc.ca/news/canada/calgary/irrigation-infrastructure-upgrades-alberta-1.7189739
[43] BC Rural Centre. "Historic investment of $83 million in water storage for farmers and ranchers," *Press Release*, February 22, 2024. https://bcruralcentre.org/historic-investment-in-water-storage-for-farmers/
[44] Natural Resources Canada. "How will climate change impact Canada's water resources," *Government of Canada*, December 27, 2024. https://natural-resources.canada.ca/stories/simply-science/will-climate-change-impact-canada-s-water-resources
[45] Cooke, Brendan and Marla Orenstein. *Electricity systems across Western Canada*. Canada West Foundation, July 2023.
[46] Ibid, p. 4.
[47] Ibid.
[48] Hiebert, Kyle, Dan Lussier, Elisabeta Lika and Tyler McCann. *The future is digital: Digital agriculture and Canadian agriculture policy*. The Canadian Agri-Food Policy Institute, May 2025, p. 14, https://capi-icpa.ca/wp-content/uploads/2025/05/2025-05-20-Digital-Agriculture-EN-CAPI.pdf
[49] Parikoglou, Iordanis, Grigorios Emvalomatis, Doris Läpple, Fiona Thorne and Michael Wallace. "The contribution of innovation to farm level productivity," *Journal of Productivity Analysis*, 62, 2024, p. 239-255. DOI: 11123-024-00728-0.
[50] Lowenberg-DeBoer, James. "Economics of adoption for digital automated technologies in agriculture," *Background Paper for the State of Food and Agriculture*. FAO working paper 22-10, 2022. https://openknowledge.fao.org/server/api/core/bitstreams/37a6d35a-ad1d-43b2-9f49-86615b0e289f/content
[51] Ibid.

Infrastructure Needs: Agri-food Export

Transportation and logistics infrastructure is essential to moving products off farm for processing or to market. This infrastructure is interconnected and interrelated, so when assessing the ability to export goods or bring in needed imports, it is important to "look at the entire network."[52]

If grains are to be processed or manufactured further, they are sent to process elevators. There are 58 in the western provinces, ranging from 28 in Saskatchewan to one in British Columbia. Once grains are ready for export, they are transferred to terminal silos where they are cleaned and stored before export. There are 11 in the western provinces, with one in Manitoba and the remainder in British Columbia.[53]

Once the grains or oilseeds are ready for export, they are shipped to the appropriate terminal, typically by rail. The number of cars and location depends on how much product is to be exported and where the final product is going. About 78 per cent of grain and oilseed cars were shipped to the west coast in 2024, with wheat occupying the most rail space.[54]

From the west coast, most agriculture port traffic is to ship commodities to Asia and, to a lesser extent, Africa or Oceania.

Table 5

Specific Canadian Grain Exports (in kilotonnes) by Destination Region and Canadian Port – British Columbia and Prairie Exports, 2024[55]

Region	Wheat	Canola	Amber Durum	Corn	Peas	Lentils	Barley	Oats
Africa	1,790.2	-	**2,173.6**	9.5	-	82.3	-	31.8
Asia	**9,846.9**	**7,531.7**	416	25.2	**2,072**	**930.6**	**2,338.7**	34.5
Eastern Europe	15	41.3	-	-	-	-	-	-
Western Europe	1,755.6	450	1000.9	**1920**	-	-	-	2.2
Oceania	9	-	-	-	-	-	-	-
Western Hemisphere (exclude U.S. and Mexico)	5,504.3	-	371.4	3.3	40	59.6	-	74.8
United States	106.3	599.2	-	4	-	-	35.1	179.3
Mexico	394.7	9.1	-	-	-	-	-	**181.8**

Source: CWF Calculations, Canadian Grain Commission Open Data

[52] Chris Hall, President and CEO, Shipping Federation of Canada as cited in Tenpenny, John. "Strengthening Canada's supply chain through its ports," *ReNew Canada*, August 29, 2022.
[53] Canadian Grain Commission. *Grain Elevators in Canada Crop year 2024-2025*. https://www.grainscanada.gc.ca/en/grain-research/statistics/grain-elevators/reports/pdf/2025-05-01.pdf
[54] Canadian Grain Commission Open Data and CWF calculations.
[55] Not feed grade

The Port of Vancouver has the most export traffic out of all ports in Canada and on the Pacific Ocean for grains and seeds. Those grain or oilseed products that are shipped to western Europe or to the United States often travel through ports in Ontario. Storage and manufacturing facilities for western agri-food products are in the Prairies or British Columbia.

Table 6

Specific Canadian Grain Exports by Destination Region and Water Port – British Columbia and Prairie Exports, 2024, total rail cars[56]

Port	Wheat	Canola	Amber Durum	Corn	Peas	Lentils	Barley	Oats
Bay and Lakes (ON)	160.6	-	-	**1,477.5**	-	-	-	
Prince Rupert (BC)	3,368.8	569.3	63.3	-	-	-	472.1	11
St. Lawrence (ON)	3,882.2	-	1,713.4	484.5	-	-	-	2.2
Thunder Bay (ON)	634.5	294	323.5	-	-	110.7	35.1	183.8
Vancouver (BC)	**11,375.9**	**7,768**	**1,861.7**	**-**	**2,112**	**961.8**	**1,866.6**	**307.4**

Source: CWF Calculations, Canadian Grain Commission Open Data

Meat products follow a similar trend with the United States, the lead export destination for fresh or chilled products, while Asia is the lead destination for frozen and cured or processed meats.

Table 7

Total Weight (kg) of Meat Exports by Destination Region – British Columbia and Prairie provinces, 2024

Destination Region	Fresh/Chilled	Frozen	Cured/Processed
United States	344,238,064	36,291,583	9,632,632
Asia	183,640,379	266,420,855	12,551,899
Mexico	109,101,899	22,524,895	6,977,168
Western Europe	989,280	5,550	18,174
Western Hemisphere[57]	223,028	14,548,499	71,771
Oceania	47,036	10,747,301	2,554
Africa	22,400	6,059,451	-
Eastern Europe	-	74,998	-
Total	638,262,086	356,673,132	29,254,198

Source: CWF calculations, Canadian International Merchandise Trade

[56] Not feed grade
[57] Excludes U.S. and Mexico

Most of these products are shipped to destinations for further processing, manufacturing or even conversion to biofuels. The value-add sector has made efforts to grow, particularly with the concerns over domestic food security which arose during the pandemic, but is heavily concentrated in the U.S. export market. Manufacturing primarily occurs in central Canada with little change over the past decade and would mostly travel by road or rail rather than through ports. The City of Calgary approved permits for a renewable biofuels facility in late 2024 with construction to begin in 2025 pending financing.[58]

With the United States' *Inflation Reduction Act*, the Canadian biofuels industry has taken a significant hit as the Act's production tax credit has incentivized U.S.-based production.[59] Europe could be an alternative destination, but export would rely on ports rather than the multimodal options available when exporting to the U.S. Shipping biofuels using tankers is not without risk as "biofuels primarily rely on the chemical tanker market, which is already in high demand for transporting traditional chemical cargoes."[60] Regulatory variability and market volatility can also compound these issues.[61]

Table 8

% of Value-Add Food Exported by Province to United States versus others, 2014 and 2024

	2014	2024	Difference
Ontario	46.3	49.1	2.8
Quebec	21.8	21.1	-0.7
British Columbia	5.9	5.6	-0.3
Alberta	3.0	4.6	1.6
Manitoba	3.9	3.5	-0.4
Saskatchewan	0.1	0.1	0.1
New Brunswick	3.7	3.1	-0.7
Prince Edward Island	2.4	3.2	0.8
Nova Scotia	0.8	0.9	0.1
Newfoundland	0.3	0.2	-0.1
Other countries	11.8	8.6	-3.2

Source: Trade Data Online, HS 17-21

[58] Green Impact Partners. "Future Energy Park," *Portfolio*. https://www.greenipi.com/portfolio/
[59] Bakx, Kyle. "Feds give financial boost to biofuel sector amid growing U.S. competition," *CBC News*, April 28, 2024. https://www.cbc.ca/news/canada/calgary/bakx-budget-biofuels-feds-ira-1.7186406
[60] Saxby, Josh. "Shipping biofuels: Navigating new challenges with strategic solutions," *News and Insights*, Clarksons, April 14, 2025. https://www.clarksons.com/home/news-and-insights/2025/shipping-biofuels-navigating-new-challenges-with-strategic-solutions/
[61] Ibid.

Compounding the challenges of building diversification in supply chains is the fact that infrastructure has, at times, been unreliable due to capacity, environmental or labour challenges.

The Indo-Pacific continues to be a strong market and the federal government and western premiers have identified opportunities beyond China in the region in countries such as Vietnam and Indonesia. Market growth and opportunity will continue to drive exports and the west coast ports will also need additional support, as farmers may choose to expand exports into Asian markets.

For those who want to grow and diversify the value-add sector and diversify markets, production hubs and transport supply chains are almost entirely focused on the U.S. market and moving products from central Canada south. Given food security concerns, there is further work to do on this specific issue to map out a strategy that aligns export market potential with value-add manufacturing infrastructure and supply chain development and capacity across the west.

Compounding the challenges of building diversification in supply chains is the fact that infrastructure has, at times, been unreliable due to capacity, environmental or labour challenges. As the Canadian Chamber of Commerce summarizes, "regular bottlenecks … have hindered the growth of Canadian agri-food exports"[62] for those areas in which the country is successful. An overall national strategy on infrastructure should consider where markets could diversify and the effects, alongside where support is needed for existing infrastructure to meet growing demand in existing trade areas.[63]

Investment

There is significant investment needed in Canada's agricultural sector to meet the moment, including the on-farm investments needed to scale up and grow to create more efficient and productive systems, larger-scale projects to expand transport and logistics infrastructure to adapt to new markets.

Geopolitical and market uncertainty can make it difficult for farmers to think in the long term – which is important for both market diversification planning and digital adoption. Support for farmers affected by either tariffs or non-tariff barriers to export markets can help take some pressure off so they can focus on their production.

[62] Canadian Chamber of Commerce. "Policy matters: How to grow Canada's agriculture and agri-food industry," *Blog post*, July 15, 2025, para. 9. https://chamber.ca/policy-matters-how-to-grow-canadas-agriculture-and-agri-food-industry/
[63] Ibid.

Reducing regulatory barriers was a consistent theme at the roundtable.

Most Foreign Direct Investment (FDI) in the sector is concentrated in food manufacturing, with Europe providing 72 per cent of investment to food manufacturing in 2024 and 50 per cent in agriculture, forestry, fishing and hunting. Other North American countries provide most of the remaining quarter of manufacturing FDI, while Asian countries provide most of the remaining investment in agriculture, forestry, fishing and hunting.[64]

As manufacturing is mostly concentrated in central Canada, it is highly likely, but not clear, that most FDI is also concentrated in those provinces. With the push for trade diversification and domestic manufacturing in the Prairies and British Columbia, there may be an opportunity to attract investment further west. However, these efforts should align with efforts on infrastructure to ensure there is sufficient capacity to handle increases across the supply chain if investment is brought in.

While there are traditional government agri-food investment arms, such as Farm Credit Canada, there is an opportunity to explore how other finance agencies can support the ripple effects of modernizing and expanding the sector's production and market reach.

Regulations

Reducing regulatory barriers was a consistent theme at the roundtable. These barriers prevent Canadian food from reaching consumers at low prices, which prevents domestic producers from reaping the economic benefit of their efforts. While Canadian governments may not be able to directly remove these barriers, they can support the industry in ensuring that food safety standards protect Canada's reputation and stand up for Canadian products when such barriers are unfairly applied.

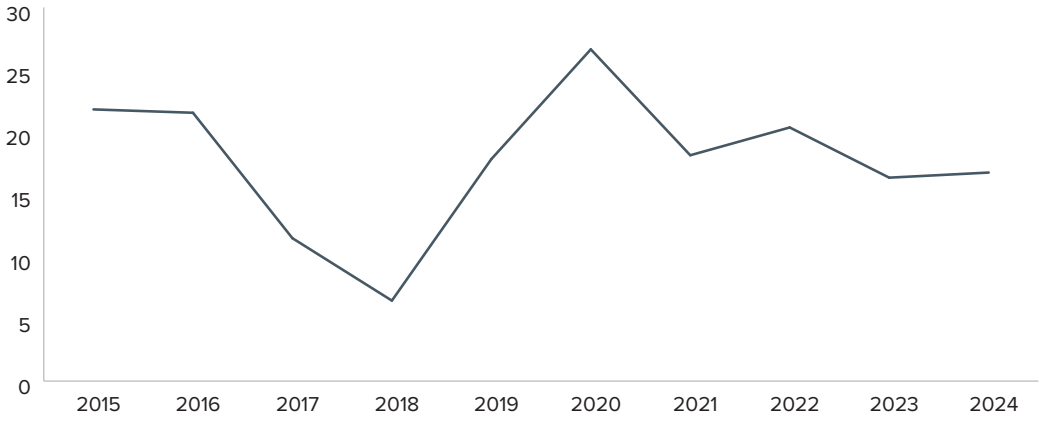
For example, neither Italy nor the European Union produce enough durum wheat to meet demand for pasta production. As such, Italy is a significant importer of Canadian durum wheat. In 2017, Italy introduced mandatory country of original labelling (MCOOL) for pasta products. Canadian exporters raised concerns that MCOOL would drive down Canadian durum prices in the country. The labelling is intended to support "Made in Italy" pasta production and supply chains. There were also unsubstantiated allegations that Canadian durum had herbicide (glyphosate) residue.[65]

[64] ww

Exports from Canada dropped in the immediate aftermath but peaked due to pandemic pressures in 2020. Levels have now stabilized to between 16 and 17 per cent of Canada's exports. Prior to the MCOOL, about 20 per cent of Canada's durum exports went to Italy.

Figure 1

% of Canadian durum wheat exports to Italy, 2015-2024



Source: Canada Trade Data Online

The joint statement with the European Union emphasized agri-food, but the EU wants to expand MCOOL into other agriculture products. Despite industry pressure, Canada did not file a complaint over Italy's MCOOL. If the EU introduces MCOOL requirements on a broader range of products, there may be renewed pressure from the agriculture industry to initiate a dispute.

When the United States brought in MCOOL for beef products in 2009, Canada took the issue to the WTO alongside Mexico. The WTO determined both countries could enact retaliatory tariffs on the United States to recoup the costs. Congress repealed the legislation before the retaliatory measures could come into effect.[66] Now, the United States will bring voluntary COOL (VCOOL) into effect in January 2026. Alongside tariffs, this practice could see Canadian exporters look to grow in alternative markets, but the EU may be a challenge given MCOOL.

The EU Carbon Border Adjustment Mechanism (CBAM) is another regulatory area which affects Canadian agricultural exports to the region. The EU CBAM allows the region to "impose fees on select imports to account for greenhouse gas emissions released during their production."[67] This fee is intended to prevent "carbon leakage [which] happens when countries move production abroad, often to countries with less stringent or no environmental policies."[68] Canada and other countries are also weighing the introduction of their own CBAM. The Canadian Pork Producers say such a move by Canada would "pose a significant threat to the competitiveness, economic sustainability, and operational costs of Canadian pork producers."[69]

[66] Mitchell, Alice. "US repeals controversial country-of-origin labelling rules," *The Beef Site*, December 22, 2015. https://www.thebeefsite.com/news/49074/us-repeals-controversial-country-of-origin-labelling-rules

[67] Thomas, William. *Exploring the EU's carbon border adjustment policy*. EDC Economics, June 2023, para. 1. https://www.edc.ca/content/dam/edc/en/premium/guide/carbon-border-adjustment-impacts.pdf

[68] Campbell, Dr. A. Neil and Talia Gordner. "Communication is key: Cooperation between Canadian exporters and European Union importers will be essential to operate under the Carbon Border Adjustment Mechanism Regulation," *Insights*, MacMillan, October 4, 2023.

[69] Roy, René. "Impact of Border Carbon Adjustments and reciprocity standards on Canadian agriculture," *House of Commons Standing Committee on Agriculture and Agri-Food*, October 3, 2024, p. 2. https://www.ourcommons.ca/Content/Committee/441/AGRI/Brief/BR13447980/br-external/CanadianPorkCouncil-e.pdf

The agriculture sector is essentially caught in a "general dilemma between climate change mitigation and adaptation."

For those agricultural products exported to the EU, such as pulses, the EU Carbon Border Adjustment Mechanism is seen as "a prime example of how an effort to reduce emissions has resulted in, and provided cover for, protectionist trade policies and barriers to freer and fairer trade."[70] It is argued that the CBAM is another non-tariff barrier to protect the domestic EU agricultural industry but no cases have been brought forward to the WTO to test the mechanisms and how they may or may not conflict with certain rules.[71]

These non-tariff barriers and others, such as recent canola restrictions in China, are a serious challenge for Canada's agricultural industry. While there may be an interest in expanding exports and for ensuring that allies have reliable food sources, these barriers disincentivize Canadian farmers from diversifying into regions with NTBS that affect their products.

Environment

The agriculture sector is essentially caught in a "general dilemma between climate change mitigation and adaptation."[72] Canada and the EU have taken different approaches with the EU curbing "fertilizer and chemical use and ban[ning] modern crop breeding technologies."[73]

While the Canadian government has supported such innovations, Canadian policy is still seen as too heavily focused on mitigation rather than adaptation, lacks a strategy which addresses both aspects and tries too hard to create one-size-fits-all solutions when commodities are not homogenous.[74] Anecdotally, researchers have also heard that federal research funding for agriculture adaptations has fallen but sourcing data to test such claims has proven difficult.

Environmental policies have also been made without proper strategy or consultation. The Commissioner of the Environment and Sustainable Development's audit of Agriculture and Agrifood Canada's climate change mitigation efforts found that the department "had no strategy in place to guide its climate change mitigation programs and efforts."[75]

[70] Greg Northey as cited in "Evidence," *Standing Committee on Agriculture and Agri-Food*, House of Commons, October 10, 2024. https://www.ourcommons.ca/Content/Committee/441/AGRI/Evidence/EV13331702/AGRIEV113-E.PDF
[71] Tombs, Kenneth. *The Carbon Border Adjustment Mechanism (CBAM) faces several issues and challenges, both legal and practical*. The International Trade Council, May 2024. https://tradecouncil.org/wp-content/uploads/2024/10/The-Carbon-Border-Adjustment-Mechanism.pdf
[72] Mussell, AL "Climate change in Canadian agriculture: The context and evidence should refocus policy on adaptation," *Policy Concepts Paper*. Agri-Food Economic Systems, June 2024. https://www.agrifoodecon.ca/uploads/userfiles/files/climate%20change%20in%20canadian%20agriculture%20june%2019(2).pdf
[73] Smyth, Stuart. "Canadian innovation beats EU precaution in agriculture sustainability: Stuary Smyth for Inside Policy," *MLI*, September, 2023, para. 3. https://macdonaldlaurier.ca/canadian-innovation-beats-eu-precaution-in-agriculture-sustainability-stuart-smyth-for-inside-policy/
[74] Mussell, AL "Climate change..."
[75] Office of the Auditor General. "Agriculture and Climate Change...," s. 5.11.

Western Canadian farms have the largest payouts for hail, crop or market challenges over the last decade, and payments have increased significantly.

Table 9

Direct Payments ($ Millions) to Farms for Recovery – Regional Comparison, 2014 and 2024

	2014	2024	% Increase
Western Canada	1,392,874	2,378,726	71
Central Canada	319,942	533,973	67
Atlantic	77,643	110,342	42

Source: Statistics Canada, Table 32-10-0045-01, AgriInvest, Agri-Stability, private insurance and crop insurance payments.

Western Canadian farms have the largest payouts for hail, crop or market challenges over the last decade, and payments have increased significantly. Crop insurance has been particularly high as producers face more extreme weather causing droughts or wildfires. Hail damage is also particularly challenging in the prairie provinces. Higher market costs for products also increase payouts as crops are worth more.

In response to the combined pressures of extremely dry conditions and market volatility, the federal government recently increased the compensation rate from 80 to 90 per cent to a maximum of $6 million up from $3 million.[76] With these challenges expected to persist, there is a risk that these programs may become unsustainable and there is an opportunity for government, agricultural sector representatives and the finance and insurance industry to come together and develop a longer term strategy to support the sector in both adapting to the challenges of climate change and mitigating the effects of the agriculture sector on the environment.

[76] Agriculture and Agri-Food Canada. "AgriStability," *Programs*, Government of Canada, July 2025. https://agriculture.canada.ca/en/programs/agristability

Indigenous ownership and engagement

In 2021, about 2.8 per cent of farmers self-identify as Indigenous, up one percentage point from 2016, with a significant majority concentrated in Western Canada. Most Indigenous farmers produce crops or oilseeds.[77]

Table 10

Indigenous farmers by Canadian Region – 2021 Census of Agriculture

	Total	**%**
Western Canada	12,450	75
Central Canada	3,910	23
Atlantic	345	2
Total	1,6705	100

Source: Statistics Canada Census of Agriculture

Farm Credit Canada estimates that increasing Indigenous representation in agriculture and getting Indigenous farms to comparable income levels with non-Indigenous farms would lead to "a $1.5 billion boost in primary agriculture GDP."[78] Financing is a significant barrier alongside Indigenous talent development for the sector.[79] Land ownership under the *Indian Act* can prevent First Nations communities from establishing farms.[80]

The motivations related to "food security, food sovereignty [and] self-sufficiency"[81] are the priorities for Indigenous producers, rather than export. These goals align closely with those of Indigenous youth, who are the fastest growing populations across the prairies, particularly in rural areas. They prioritize working for Indigenous employers in jobs that directly support and benefit to their communities.[82] Agriculture also offers an opportunity for youth to learn and incorporate traditional practices related to food, land and the environment.

There are a range of organizations working to build Indigenous agriculture, including federal programs that provide supports to grow business, talent and market opportunities. Navigating the range of programs and requirements can be a challenge for those looking to enter, work in or scale up in the sector.[83] These programs can also be inaccessible due to eligibility or other requirements or difficult to navigate.

[77] St. Pierre, Michelle and Chen, Zong Jia. "The socioeconomic portrait of the Indigenous farm population in Canada, 2021," *Canadian Agriculture at a Glance*, Statistics Canada, March 7, 2024. https://www150.statcan.gc.ca/n1/pub/96-325-x/2021001/article/00020-eng.htm

[78] Kwarteng, Isaac. "Indigenous agriculture opportunities could boost GDP by $1.5 billion," *FCC Knowledge*, January 31, 2024. https://www.fcc-fac.ca/en/knowledge/economics/indigenous-agriculture-opportunities

[79] Canadian Agricultural Human Resource Canada and Beverley O'Neil. *What we heard report: Indigenous agriculture and agri-food in Canada*. Government of Canada, July 30, 2021. https://agriculture.canada.ca/en/indigenous-peoples/what-we-heard-report-indigenous-agriculture-and-agri-food-canada

[80] Farm Management Canada. *Indigenous agriculture and agri-food: The Path Forward*, 2021. https://fmc-gac.com/wp-content/uploads/2021/09/The-Path-Forward-Supporting-Indigenous-Ag-Farm-Management-Canada-2021-EN.pdf

[81] Ibid, p. 17.

[82] Laverty, Stephany and Janet Lane. *Finding their place: Manitoba youth mobility*. Canada West Foundation, September 2024. https://cwf.ca/wp-content/uploads/2024/09/2024-09-29-CWF_Finding_Their_Place_Full_Report_WEB_FINAL.pdf

[83] Canadian Agricultural Human Resource Canada and Beverley O'Neil. *What we heard*....

Energy

Key findings:

- Inclusion of the LNG Canada Phase 2 on the federal government's major projects list is encouraging and an essential next step in getting Western Canadian energy to new markets.
- For Canada to provide similar diversification opportunities and energy security for partners who need oil, tidewater access is essential.
- Regulatory delays, evolving market conditions and input costs for conventional energy expansion have stalled new investment and capital reinvestment in Alberta and Saskatchewan.
- If Canada wants to be a reliable energy supplier, the regulatory environment needs a significant shift to one which guarantees timely decisions to provide more certainty and also avoid delays which can see projects reassessed due to market conditions or input costs.
- Many Indigenous communities in Western Canada are involved in conventional and renewable energy production as owners and partners.
- Historical experience and current processes which do not respect free, prior and informed consent are barriers to communities building their own projects or partnerships.

Western Canadian context

Energy security was a common theme in the G7 meeting and Prime Minister Carney said the session "about energy security and critical minerals was the most important session of the conference."[84] The EU statement recognizes the importance of "more resilient, diversified, reliable energy supply chains," with a focus on renewable, clean and new energies. The Canada-Italy joint statement includes energy as an area to focus on expanding trade opportunities between the two countries, alongside investment. There was also a commitment to explore cooperation on nuclear energy and hydrogen.[85]

[84] Varcoe, Chris. "Amid geopolitical dangers, G7 leaders wrap Kananaskis summit touting energy security and critical minerals," *Calgary Herald*, June 18, 2025. https://calgaryherald.com/business/varcoe-g7-leaders-wrap-up-kananaskis-summit-touting-energy-security-and-critical-minerals

[85] Government of Canada and Government of Italy. "Canada-Italy joint statement," *Prime Minister of Canada*, June 17, 2025. https://www.pm.gc.ca/en/news/statements/2025/06/17/canada-italy-joint-statem

At CWF's roundtable, there was a strong sense that Canada must find a way to work together, harness the urgency of the moment, and get products moving — yet Canadians are, to varying degrees, standing in their own way. A central theme and point of divergence between conventional and cleantech proponents was the role of government.

Participants from conventional energy production argued that government should play a more active role in championing the sector both domestically and internationally. They emphasized the need to ease regulatory barriers that delay or block products from reaching market. Specific concerns included gaps in the *Impact Assessment Act*, the emissions cap, and carbon pricing — all seen as disincentives to investment. On these fronts, many believed government should "get out of the way."

In contrast, those focused on emerging resources and clean technologies highlighted the smaller scale of their operations and the intense global competition they face. For these companies, government support was viewed as essential — not only through direct financial backing to help level the playing field, but also by investing in trade-enabling infrastructure abroad. In particular, they pointed to a missed opportunity in Canada's current focus on domestic infrastructure, arguing that support for import infrastructure in target markets, especially for liquified natural gas (LNG), would better position Canadian products globally.

Infrastructure

Western Canada has the highest number of pending energy infrastructure projects out of all Canadian regions. The inventory list designates certain projects as clean tech so that term is used when referring to the major projects inventory list. As shown in Table 13, Western Canada also has the most diverse range of pending clean energy project types including solar, carbon capture and storage and tidal. Western Canada also has the largest number of conventional and clean energy projects under construction (Table 14).

Table 11

Planned Conventional Energy Infrastructure Projects (excluding transmission lines) Major Projects Inventory (cleantech excluded)

	Count	Total Capital Cost ($)	Capital Cost/Project ($)
Western Canada	62	~233 billion	~4 billion
Central Canada	3	~529 million	~176 million
Atlantic	4	~24 billion	~6 billion
North	2	~220 million	~110 million

Source: CWF calculations, Natural Resources Canada projects inventory

Table 12

Planned Clean Tech Energy Infrastructure Projects (excluding transmission lines) Major Projects Inventory

	Count	Total Capital Cost ($)	Capital Cost/Project ($)
Western Canada	62	~74 billion	~811 million
Central Canada	3	~35 billion	~1.4 billion
Atlantic	4	~1 billion	~87 million
North	2	~1.3 billion	~426 million

Source: CWF calculations, Natural Resources Canada projects inventory

Table 13

Planned Clean Energy Projects by Type – Major Projects Inventory

Clean Energy Type	Western Canada	Central Canada	Atlantic	North
Solar	29	-	-	-
Hydro	25	10	4	2
Bioenergy	15	9	1	-
Wind	12	1	3	-
Carbon capture and storage	5	-	-	-
Geothermal	4	-	-	-
Tidal	1	-	3	-
Energy storage	-	1	-	-
Nuclear	-	2	-	-
Other	-	2	1	1

Source: CWF calculations, Natural Resources Canada projects inventory

Table 14

Conventional Energy Infrastructure Projects Under Construction (excludes transmission lines) – Major Projects Inventory

	Count	Total Cost	Cost/Project
Western Canada	16	~68 billion	~43 million
Central Canada	1	77 million	77 million
Atlantic	2	~6 billion	~3 billion
North	-	-	-

Source: CWF calculations, Natural Resources Canada projects inventory

Table 15

Clean Energy Projects Under Construction (excludes transmission lines)

	Count	Total Cost	Cost/Project
Western Canada	29	~33 billion	~1 billion
Central Canada	9	~30 billion	~3 billion
Atlantic	7	~626 million	~89 million
North	2	~1 billion	~618 million

Source: CWF calculations, Natural Resources Canada projects inventory

Most clean energy projects currently under construction are located in Western Canada, with the majority being hydro or solar.

Table 16

Planned Clean Energy Projects by Type – Major Projects Inventory

Clean Energy Type	Western Canada	Central Canada	Atlantic	North
Solar	9	-	-	-
Hydro	12	4	4	1
Bioenergy	2	2	1	-
Wind	5	1	1	-
Carbon capture and storage	1	-	-	-
Geothermal	-	-	-	-
Tidal	-	-	1	-
Energy storage	-	-	-	-
Nuclear	-	2	-	-
Other	-	-	-	1

Source: CWF calculations, Natural Resources Canada projects inventory

Hydro is the dominant energy source in Canada, as abundant water resources across regions give it a strong advantage. However, this can skew comparisons between other renewable sources and the fossil fuel industry. If hydro is excluded, most of Canada's electricity capacity comes from conventional energy sources. Natural gas and coal are the leading sources, although coal's share has declined due to production phase-outs.[86]

Canadian-generated electricity exports are all sent to the United States. Similarly, energy products destined for refining or electricity generation are also exported exclusively to the United States, due to limited infrastructure for accessing other international markets. Conventional oil and gas exports also primarily go to the U.S., with the exception of volumes transported via the recently completed Trans Mountain Pipeline Expansion. This new capacity enables exports through the west coast, with approximately half of its output now shipped to Asia.[87] The price for Canadian crude has also risen, dropping the price differential to Brent Crude "to under $10 a barrel, down from around $18-$20,"[88] as access to an expanded consumer base boosts demand. Although shipping costs through the pipeline were higher than expected, resulting in underutilization, production is projected to ramp up in the coming years.[89]

[86] International Renewable Energy Agency (IRENA) data
[87] Duhatschek, Paula. "One year after the Trans Mountain pipeline expansion, why isn't it full?," *CBC News*, May 3, 2025. https://www.cbc.ca/news/canada/calgary/one-year-after-the-trans-mountain-pipeline-expansion-why-isn-t-it-full-1.7525284
[88] Ibid
[89] Ibid

At the roundtable, participants expressed concern that the federal government's project list could create a two-tier system. Projects not included on the list may face delays or stall altogether...

Western Canada's liquefied natural gas (LNG) market access also recently expanded through the West Coast. In July 2025, the LNG Canada facility shipped the country's first-ever LNG cargo to a port in South Korea.[90] Landlocked provinces want to access tidewater to diversify their energy export markets, especially in response to U.S. tariffs, but there are no pipelines currently in the national infrastructure inventory to facilitate this access. These projects have faced significant challenges and barriers to construction.

The federal government's recently passed Bill C-5 includes the *Building Canada Act (BCA)* which contains provisions to designate certain projects in the national interest. Regulatory decisions for the projects listed will be "deemed to be made or formed in favour of approving the project."[91] Project proponents must still submit all the required documents and the minister will have to consult with First Nations and regulatory bodies.

Regulatory bodies have to confirm that projects "would not jeopardize health, safety, security or Canada's international obligations."[92] It is also not clear how recent Supreme Court decisions on Indigenous rights, the duty to consult and similar requirements would impact those projects deemed in the national interest under the BCA.[93]

At the roundtable, participants expressed concern that the federal government's project list could create a two-tier system. Projects not included on the list may face delays or stall altogether, as key resources like labour and equipment are directed toward listed projects. There was particular unease about the future of a pipeline to tidewater, given past challenges with similar proposals.

Investment

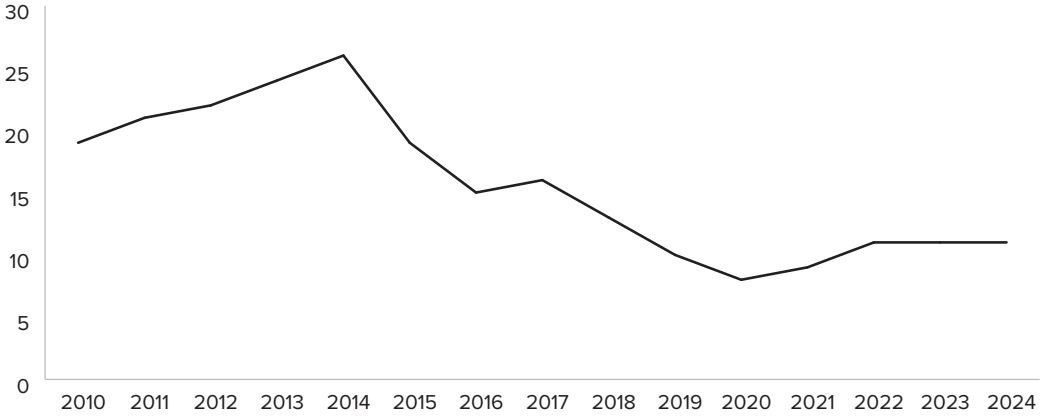
Regulatory uncertainty is often cited as a reason for declining investment because it can prevent operations from starting or expanding. As the case of LNG Canada demonstrates, increasing market access can increase demand and prices, which in turn can see investment recirculated back into the industry through capital expenditures (capex) or draw in new investment from other sources.

[90] Potkins, Meghan. "Canada's first large-scale shipment of LNG delivered to port in South Korea," *Financial Post*, July 17, 2025. https://financialpost.com/commodities/energy/oil-gas/canada-first-shipment-lng-delivered-south-korea
[91] Doyle, Catherine, Kyle Lambert, Sharon G.K. Singh, Melissa Stoesser Young. "Re-paving process: Bill C-5's impact on major project approvals and mobility," *Insights*, MacMillan, June 11, 2025. https://mcmillan.ca/insights/re-paving-the-process-bill-c-5s-impact-on-major-project-approvals-and-mobility/
[92] Ibid.
[93] Ibid.

While periods of high oil prices have traditionally led to reinvestment, economic activity and job growth, that pattern appears to be changing. The share of national capital expenditures from Western Canada's oil and gas sector has dropped significantly — from a peak of 26 per cent in 2014 to just 11 per cent in 2024. Notably, although oil prices have been recovering since the COVID-related crash in 2020, capex has not followed suit. This downward trend is concerning as reduced investment "undermin[es] competitiveness and long-term growth potential."[94]

Figure 2

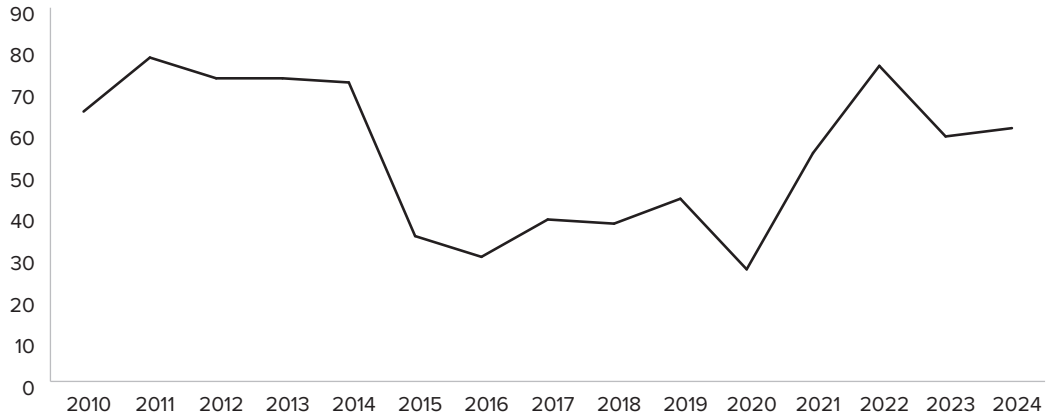
% of Canadian Capital Expenditures from Western Canadian Oil and Gas – 2010 to 2024



Source: Statistics Canada Table 34-10-0035-01

Figure 3

Average Western Canada Select Price/Barrel – 2010 to 2024 (US Dollars)



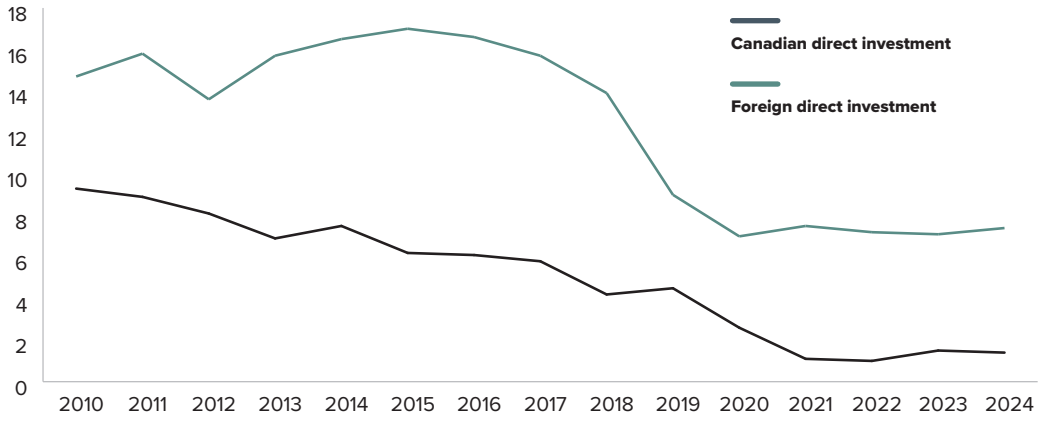
Source: Alberta Energy Regulator, Western Canadian Select

[94] Zhang, Lawrence and Meghan Ostertag. *Underinvestment in capital equipment hinders Canadian productivity growth.* Centre for Canadian Innovation and Competitiveness, May 2025, p. 1. https://www2.itif.org/2025-canadian-capex-report.pdf

In 2010, foreign direct investment in Canadian energy comprised 15 per cent of all FDI into Canada with most in equity investments. In 2024, only seven per cent of FDI investment in Canada was in oil and gas, again, with most in equity investments.

Figure 4

Canadian Outbound versus Foreign Inbound Investment – % Oil and Gas of Total Investment, 2010-2024



Source: CWF calculations, Statistics Canada Table 36-10-0008-01

Bloomberg reports that Canadian investment in renewables and infrastructure in 2024 reached USD $35 billion, a 19 per cent increase from 2023. However, tracking investment in low emissions technologies is difficult, as there is no single publicly available data source, such as Statistics Canada, which tracks investment by energy source or location. It is not clear how much of that investment went into Canada and how much was directed elsewhere. For example, Enbridge has announced a $900 million investment in Texas for a 600 MW solar project to power Meta.[95]

As there is a range of company sizes and mix of emerging and established energy sources, the industry is more reliant on government grants, programs and incentives than conventional energy. These companies are also more susceptible to the "start-up to scale up support gap"[96] and may present more risk to investors as they incorporate new technologies to harness new sources of energy.

It's no surprise, then, that the conventional and renewable sectors offered different perspectives at the roundtable on what's needed to attract investment. Conventional energy emphasized the need for regulatory certainty to restore investor confidence after a decade of volatility. In contrast, the low-emissions and renewable sectors require government support through early development and stronger connections with investors to scale up.

[95] Metea, Rachel. "Enbridge to invest $900 million in more Texas solar," *PV Magazine*, July 22, 2025. https://pv-magazine-usa.com/2025/07/22/enbridge-to-invest-900-million-in-more-texas-solar/

[96] RBCX. "Commercializing Canadian cleantech: Acquiring capital," *Blog post*, April 30, 2024, para. 5. https://www.rbcx.com/ideas/profiles/commercializing-canadian-cleantech-acquiring-capital/

Regulations

The mining sector faces regulatory challenges that are similar to mining except for one critical area: interprovincial pipelines and transmission lines, which are federally regulated by the Canadian Energy Regulator. All of Canada's electricity exports currently go to the United States. While there is discussion about subsea transmission from North America to Europe, this project is still very early and has "a long way to go"[97] before it will attract the investment needed. At the roundtable, all discussion focused on LNG and pipelines which will be the focus of this section.

Although only about 10 per cent of pipelines in Canada fall under the jurisdiction of the Canada Energy Regulator (CER), they play a critical role in connecting landlocked provinces to tidewater. To proceed, these projects must be approved both by the CER and by the provinces through which the pipeline will pass.

Most CER-regulated pipelines begin in Alberta and are concentrated in Western Canada, which also accounts for the majority of Canada's interprovincial and international energy trade. As a result, companies in the region engage most frequently with the regulator, which also oversees oil and gas exports.

Table 17

CER Pipeline Oversight by Canadian Region

	Oil and Liquid	Gas	Length (Thousands, KM)
Western Canada	11	6	59
Central Canada	4	2	13
Atlantic	0	2	1.6
North	1	1	2.8

Source: Canadian Energy Regulator

Emissions reduction regulations are a significant source of tension between the industry and regulators. Policy can support faster development of emissions reducing technologies and can lead to beneficial decarbonization partnerships between industry and government. However, the federal government's emissions cap, which would require companies to lower emissions to 35 per cent of 2019 levels, has sparked concerns of overregulation and raised constitutional questions about jurisdiction.[98]

The sector is hopeful the government will repeal the cap which does not come into effect until Jan. 1, 2026. If it comes into force, companies that produced over 30,000 barrels of oil equivalent in 2024/2025 would have to file annual emissions reports or be barred from emitting until they have paid the appropriate level of compliance units.[99] Rather than risk exceeding the cap, companies could adopt additional clean technologies or curb production, each with their own risks and benefits. The choice to curb production could mean that the emissions cap risks becoming "a de facto cap on production, [which] has the effect of regulating in areas"[100] of provincial responsibility.

[97] Cavcic, Melissa. "World's 'most ambitious' subsea interconnector igniting zest for clean power superhubs: Embracing NATO-L to reinforce energy security bonds between America and Europe," *Offshore Energy*, July 31, 2024, para. 14. https://www.offshore-energy.biz/worlds-most-ambitious-subsea-interconnector-igniting-zest-for-clean-power-superhubs-embracing-nato-l-to-reinforce-energy-security-bonds-between-america-and-europe/

[98] Thurton, David and Peter Zimonjic. "Federal draft rules require oil and gas sector to cut emissions 35% below 2019 levels," *CBC News*, November 4, 2024. https://www.cbc.ca/news/politics/oil-gas-emissions-cap-early-election-1.7372512

[99] Boothby, Reed, Robert Martz, and Alicia K. Quesnel. "Canada's proposed oil and gas sector emissions cap," *Insights*, November 20, 2024. https://www.bdplaw.com/insights/canadas-proposed-oil-and-gas-sector-emissions-cap

[100] Ibid

The federal government has promised to reduce the number of reviews and designate some projects as in the national interest, though the details remain unclear.

Beyond emissions, both conventional and renewable energy projects have environmental impacts and may be subject to review under the *Impact Assessment Act (IAA)*. Like regulations under the CER, the IAA has been applied to many projects—most of which are located in Western Canada.

The need to comply with CER, provincial and IAA requirements—alongside emissions reduction targets for conventional energy—has created a heavily regulated industry. These regulatory pressures are especially pronounced in energy-producing regions, particularly Alberta, where most projects are based.

The federal government has promised to reduce the number of reviews and designate some projects as in the national interest, though the details remain unclear. There is optimism within the sector that the national infrastructure projects list could include an export pipeline to the West Coast or eastern Canada, even though it was not included in the initial list.

Environment

Like agriculture and mining, the energy industry is faced with the dual challenge of reducing emissions and adapting to the impacts of climate change. In 2022, Canada ranked 11th globally for emissions from fuel combustion.[101] Approximately 30 per cent of Canada's greenhouse gas emissions come from the oil and gas sector, with about 28 per cent from transportation.[102]

There are industry-led efforts underway to make production less carbon intensive. The Pathways Alliance, made up of six oil and gas companies in Alberta, aims to reduce emissions in the oil sands through a "proposed carbon capture and storage network pipeline."[103] The federal government has identified the proposed carbon capture network and pipeline as a potential addition to the major projects list and asked the Major Projects Office to work with Pathways to advance project planning.[104]

Companies are adopting clean technologies where possible. Evok Innovations is a venture capital firm that funds clean tech projects for application in carbon-intensive industries such as energy and critical minerals.[105]

In 2018, Suncor made "one of the largest investments in electric autonomous vehicles" when it purchased over 150 haul trucks for oil sands operations.[106] Imperial has now fully transitioned its hauling fleet at the Kearl Mine and Suncor continues to grow its fleet.[107] Efforts are working. The latest intensity analysis shows that even as production has grown, "Alberta's oil sands have reduced emissions per barrel by 26 per cent, a four per cent improvement" since 2022.[108]

[101] IEA. "Canada," *Countries and Regions – North America*, n.d. https://www.iea.org/countries/canada/emissions
[102] National Inventory Report 1990–2023: Greenhouse Gas Sources and Sinks in Canada
[103] Pathways Alliance. "About us," *Who we are*, n.d. https://pathwaysalliance.ca/who-we-are/
[104] One Canadian Economy. *Major Projects Office of Canada: Initial projects under consideration*, Government of Canada, July 2025. https://www.canada.ca/en/one-canadian-economy/news/2025/09/major-projects-office-of-canada-initial-projects-under-consideration.html
[105] Evok Innovations. "Accelerating industrial innovation," *About*, n.d. https://www.evokinnovations.com/about
[106] Suncor. "Suncor Energy implements first commercial fleet of autonomous haul trucks in oil sands," *Mining.com*, January 31, 2018. https://www.mining.com/web/suncor-energy-implements-first-commercial-fleet-autonomous-haul-trucks-oil-sands/
[107] McDermott, Vincent. "Suncor on track to expand autonomous vehicle fleet by year's end," *Calgary Herald*, August 29, 2024. https://www.fortmcmurraytoday.com/news/suncor-on-track-to-expand-autonomous-vehicle-fleet-by-years-end
[108] Smith, Tanner. "Report shows Alberta producing more oil and less emissions," *Lethbridge News Now*, June 4, 2025. https://lethbridgenewsnow.com/2025/06/04/report-shows-alberta-producing-more-oil-and-less-emissions/

Indigenous ownership and engagement

Indigenous energy project ownership is slightly higher in the western provinces compared to other regions, but the north is more likely to have projects that are wholly Indigenous owned.

For those communities that own oil and gas projects, they are most often pipelines.

Table 18

Indigenous Owned Projects by Canadian Region)

	Pipeline	Gas Processing	Storage	Export
Western Canada	14	6	2	1
Central Canada	0	0	0	0
Atlantic	0	1	0	0
North	1	1	0	0

Source: Indigenous Energy Monitor

There is more flexibility in ownership agreements in Western Canada. Similar to critical minerals, agreements may not take a prescriptive model.

Table 19

Indigenous Ownership in Oil and Gas Projects by Region – Per cent of Projects by Type

	Wholly Owned	Majority	Half	Minority	Unknown
Western Canada	4	9	4	70	13
Central Canada	0	0	0	0	0
Atlantic	0	0	0	100	0
North	50	0	0	50	0

Source: Indigenous Energy Monitor

For renewables, ownership is most likely to be in solar or wind, followed by hydro. These projects are also more likely to be wholly or majority Indigenous owned compared to conventional oil and gas.

Table 20

Planned Clean Energy Projects by Type – Major Projects Inventory

Clean Energy Type	Western	Central	Atlantic	North
Solar	63	34	9	6
Hydro	37	44	2	5
Wind	37	44	41	5
Natural Gas	7	0	0	1
Geothermal	5	0	0	1
Bioenergy	4	6	0	1
Nuclear	0	0	2	0
Hybrid	2	0		1
Energy Storage	1	23	5	0

Source: Indigenous Energy Monitor (natural gas included in renewables)

Table 21

Indigenous Ownership in Oil and Gas Projects by Region – % of Projects by Type

	Wholly Owned	Majority	Half	Minority	Unknown
Western Canada	25	21	10	17	28
Central Canada	11	17	23	37	11
Atlantic	5	44	7	12	32
North	52	9	9	4	26

Source: Indigenous Energy Monitor (natural gas included in renewables)

External influences may involve economic conditions, regulations, and "environmental change"[111] over the course of the project.

Communities weigh a range of considerations when deciding whether to participate in a project. These can occur within communities, with project partners, or stem from "external risk factors."[109] Internal factors can include finance, internal support, "terms and conditions underlying the agreements,"[110] and how the project evolves over its life cycle. External influences may involve economic conditions, regulations, and "environmental change"[111] over the course of the project.

Most Indigenous investment corporations and loan guarantee programs are focused in the energy sector, particularly renewables. For those projects that partner with or involve Indigenous communities, "it is critical that Indigenous engagement and structuring are done right from the outset to attract capital, manage risk and ensure project viability."[112]

Loan guarantees back an Indigenous community's equity in a project so that the credit issuer will provide financing. The organization that guarantees the loan "will assume the debt obligation if the borrower defaults, generally after the lender has exhausted other debt recovery methods."[113] There are also start-up grants and funds that support Indigenous-led projects, such as the Smart Renewables and Electrification Pathways Program, which provided $5.8 million total for First Nation solar projects across Saskatchewan.[114] Those provinces that provide incentive programs and grants typically lead in Indigenous equity investments in projects.

[109] Wale, Janna, Michaela M. McGuire, Rosanna Carver, and Emily Lowan. *Buried Burdens: The true costs of Liquified Natural Gas (LNG) ownership*. Yellowhead Institute, July 2025, p. 14. https://yellowheadinstitute.org/wp-content/uploads/2025/07/LNG-Special-Report-Jul-21-Yellowhead-Institute-2.pdf
[110] Ibid.
[111] Ibid.
[112] Morin, Caroline, Zach Romano, Brendan Sawatsky, Claude E. Jodoin, and Joel Tallerico. "Structuring energy and Indigenous equity projects – Critical legal and tax considerations," *Bulletin*, Fasken, July 22, 2025, para. 3. https://www.fasken.com/en/knowledge/2025/07/structuring-energy-and-indigenous-equity-projects#authors
[113] Department of Finance. "Canada Indigenous Loan Guarantee Program," *News*, Government of Canada, December 16, 2024, para. 14. https://www.canada.ca/en/department-finance/news/2024/12/canada-indigenous-loan-guarantee-corporation.html
[114] Raine, NC. "Federal funds power Indigenous-led renewable energy in Saskatchewan," *Eagle Feather News*, February 13, 2025. https://eaglefeathernews.com/2025/02/13/3678/

Conclusion

This report has focused on the opportunities to grow production and exports in Western Canada's critical minerals, energy and agriculture sectors, as well as the steps needed to overcome persistent barriers. These industries are vital not only to the future prosperity of Western Canada but also to Canada's overall economic performance and contribution to global markets.

Western Canada is well-positioned to provide what the world needs, but success will depend on strong alignment between industry, government and communities in five key areas:

- What infrastructure needs to be built
- Who will fund projects and through what mechanisms
- Stakeholder consultation on regulatory constraints
- Environmental risk mitigation
- How to best support economic participation by in Indigenous communities

Although projects and mechanisms may vary by infrastructure type, industry and community, these are generally the areas where alignment is needed unlock the full potential industrial development into real opportunity.

While these goals may appear straightforward, they require meaningful collaboration. Western Canada is a diverse region with many different perspectives and interests. The ultimate success of the region's ability to realize these goals lies in the ability of stakeholders to engage in co-operative federalism, with all partners – governments, industry, Indigenous nations and communities – having a voice and a seat at the table.

At the same time, Canada must ensure that regulatory frameworks do not unintentionally prevent Western Canadian industries from pursuing opportunities or limit their access to strategic global markets. For G7 partners and other allies, removing trade and market access barriers will be essential to deepening economic ties.

With the right alignment and a shared commitment to common goals, Western Canada can lead in supplying the critical resources the world needs while also strengthening Canada's economy and creating lasting prosperity for generations to come.

When the West leads, Canada thrives.

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