



ROCKY VIEW COUNTY

TRANSPORTATION, WAREHOUSING & LOGISTICS SECTOR PROFILE

April 2025



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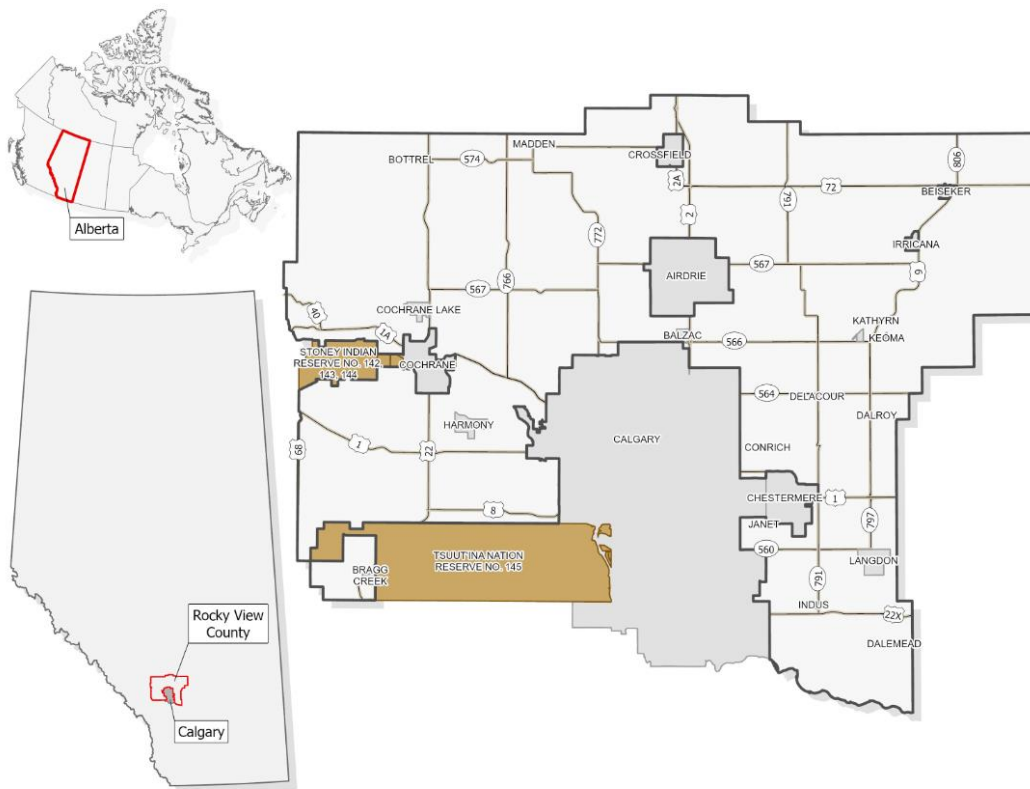
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A. Introduction

Rocky View County surrounds Alberta's largest population centre, Calgary. The County has prime access to highways, rail, and air transportation, and offers lower land values and competitive taxes compared to many other western Canadian jurisdictions. The County is part of the Calgary Census Metropolitan Area (CMA)¹ and Calgary Economic Region². It is approximately a three and a half hours' drive north of the United States border with the state of Montana and one day drive from the Port of Vancouver.

Businesses are choosing Western Canada for their distribution centers (DCs) due to a combination of strategic location, growing consumer markets, cost savings, and quality transportation infrastructure. The transportation, logistics and warehousing sector is driving investment in infrastructure, industrial parks, and transportation networks in Rocky View County. Companies like Amazon, Walmart, Home Depot, and Medline are choosing to locate in Rocky View County.

Figure 1: Map of Rocky View County Location



¹ Census subdivisions in the Calgary CMA include: Calgary, Airdrie, Rocky View County, Cochrane, Chestermere, Crossfield, Tsuu T'ina Nation 145, Irricana, and Beiseker.

² An economic region is a grouping of census divisions as defined by Statistics Canada in their Standard Geographical Classification. The Calgary Economic Region contains the communities of: Calgary; Airdrie; Rocky View County; Cochrane; Okotoks; Chestermere; Foothills County; Canmore; Strathmore; High River; Banff; Wheatland County; Drumheller; Crossfield; Stoney 142, 143, 144; Siksika 146; Tsuu T'ina Nation 145; Bighorn No. 8; Irricana; Improvement District No. 9; Banff; Beiseker; Eden Valley 216; Rockyford; Standard; Longview; Hussar; Kananaskis; Ghost Lake; Waiparous; Turner Valley; Black Diamond.

The transportation, logistics, and warehousing sector encompasses the planning, implementation, and control of the movement and storage of goods and services. These systems are critical for driving economic growth, supporting supply chain reliance and fostering regional competitiveness.

Rocky View County prioritizes the transportation, logistics, and warehousing sector, and fosters a business-friendly environment to support its growth. Through strategic infrastructure investments and streamlined development processes, the County actively encourages businesses to establish or expand their operations.

Rocky View County Advantages for Transportation, Warehousing and Logistics

- ❖ Prime location and market access.
 - Access to major highway corridors including
 - Highway 1, the Trans-Canada Highway, which provides east-west connectivity across Canada.
 - QEII, part of the CANAMEX Corridor, provides north-south access through North America.
 - The region is within a day's drive (13 hours, a trucker's standard day) of over 18 million people, and over 50 million people within 24 hours.
- ❖ Rail and intermodal connectivity via two class one railways.
 - Canadian Pacific Kansas City (CPKC) and Canadian National Rail (CN Rail) provide essential freight transportation across Canada, connect to key markets in North America, and provide vital connections to international markets through major seaports
 - Major intermodal yards provide efficient rail-to-truck and truck-to-rail transfer.
 - Access to North American markets via rail.
 - CN Logistics Park in Conrich is a growing logistics hub with rail access.
 - CPKC's head office is in Calgary.
 - The Prairie Economic Gateway is an initiative to create a new inland logistics hub and rail served business park along the CPKC rail network. Over 2,100 acres of industrial land will be made available as part of this project.
- ❖ Calgary International Airport (YYC) and air cargo.
 - One of Canada's busiest cargo airports.
 - Direct flights to global markets, including Asia, Europe, and the United States (US).
 - Customs clearance and bonded warehouse options.
 - Home to WestJet's head office.
- ❖ Industrial parks and affordable land.
 - Large industrial areas such as Balzac, which is home to major distribution centres including Amazon, Walmart, and Sobeys. Conrich, Janet, and East Balzac are emerging logistics hubs.
 - Cost-effective land options. More affordable than within the City of Calgary and the Vancouver Metro Region, offering cost savings for warehousing and distribution facilities.
 - Diverse property options including move-in ready industrial condos, large-scale warehouses, and expansive industrial land.

- Available land has options ranging from fully serviced with utilities (such as power, water, wastewater, fibre, etc.) to unserviced land - providing new developments with a wide range of options to best suit their needs.
- ❖ Business-friendly environment.
 - Low taxes. No provincial sales tax, and Rocky View County has no business tax.
 - Streamlined permitting and development. Pro-business policies for faster approvals.
 - Assistance for businesses looking to establish or expand.
- ❖ Growing workforce and skilled labour.
 - Access to a large, skilled labour pool in logistics, transportation, and warehousing.
 - Educational institutions, including the University of Calgary, Southern Alberta Institute of Technology (SAIT), and Mount Royal University, that support all aspects of transportation and logistics as well as other sector partners like maintenance, automation, and information technology (IT).
- ❖ A regional critical mass via established transportation and logistics clusters.
 - Over 180 transportation and warehousing operations (2023)³.

Since 2021, over 25 new distribution centres have located to Rocky View County, adding over 9 million square feet of new warehousing space.

B. Alberta's Transportation and Logistics Scene

The industry in Alberta includes business involved in the transportation of goods and people including air, rail, truck, and pipeline. It also includes the warehousing and storage of goods. The industry is essential to Alberta in that it comprises the foundational infrastructure and services that support the province's heavily export-dependent economy.⁴

Transportation and warehousing in Alberta:

- Generated \$18.8 billion in GDP (2023); 5.7% of total GDP.⁵
- Had the largest increase in GDP in 2023 compared to 2022.⁶
- Employed 145,800 Albertans employed (2023); 5.9% of total employment.
- Increased employment by 11.6% between 2022 and 2023.⁷

³ Statistics Canada. Table 33-10-0719-01 Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, June 2023. See Appendix A for description.

⁴ Business Council of Alberta. Alberta's Economy: Sector Snapshots: Transportation & Logistics.

⁵ <https://economicdashboard.alberta.ca/dashboard/gdp-at-basic-prices/> and <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3610040001&pickMembers%5B0%5D=1.9&cubeTimeFrame.startYear=2019&cubeTimeFrame.endYear=2023&referencePeriods=20190101%2C20230101>

⁶ <https://open.alberta.ca/dataset/d85333b0-1292-40bc-84c7-d27dce8f04b0/resource/7978b410-9a13-42d0-902b-0ee306fc9eb6/download/jet-alberta-transportation-and-warehousing-industry-profile-2023.pdf> - read Analysis.

⁷ <https://open.alberta.ca/dataset/d85333b0-1292-40bc-84c7-d27dce8f04b0/resource/7978b410-9a13-42d0-902b-0ee306fc9eb6/download/jet-alberta-transportation-and-warehousing-industry-profile-2023.pdf>

Alberta is a central hub for trade between British Columbia's ports, the US, and Eastern Canada. Alberta's transportation and logistics strengths include:

Two International Airports: The Calgary International Airport (YYC) is a regional hub for air traffic and home to WestJet's head office. The Edmonton International Airport (YEG) is Canada's largest airport by land area. The headquarters for Flair Airlines', an ultra-low-cost air carrier, is in Edmonton. Both airports are designated as Foreign Trade Zones (FTZ), which allows the deferral of taxes and tariffs on goods.

Key Highway Corridors: Alberta has a highly developed road transportation network for trucking. The Alberta CANAMEX Corridor (QEI Highway) links Alberta to the US and Mexico, the Yellowhead Corridor links Edmonton to Saskatchewan, Manitoba, and British Columbia, and the Trans-Canada Highway, Canada's longest national road, crosses all ten provinces for efficient movement of goods east-west.

Efficient Oversize and Heavy Equipment Transport: The province has numerous heavy haul corridors specifically designed for moving oversized and heavy equipment. Alberta also features a well-organized and streamlined permitting process for transporting oversized loads, supported by specialized transportation companies with expertise in heavy equipment logistics.

Two Class 1 Railways: Alberta is served by both CN Rail and CPKC. These two transcontinental railways provide Alberta industry with direct rail access to Canada's east and west coasts, major US markets in the Gulf Coast, Midwest, and Northeast. Alberta is well-positioned to access growing container markets in Asia with intermodal facilities in both Calgary and Edmonton. CPKC's head office is located in Calgary.

Extensive Network of Gas and Oil Pipelines:⁸ With one of the most extensive networks of oil and gas pipelines in the world, Alberta is a critical hub for Canada's energy sector. These pipelines enabling the efficient and cost-effective movement of crude oil, refined petroleum products, and natural gas to domestic and international markets.

Two Inland Ports: Both Calgary, and Port Alberta in Edmonton are designated Foreign Trade Zones (FTZ). FTZ's streamline imports and exports, which reduces shipping costs, and transit time, thus improving efficiency. These efficiencies help attract warehousing, distribution centres and logistics companies to the province.

A Booming Shipping and Warehousing Industry: Alberta is seeing a warehouse construction boom, with modern robotics and AI-driven inventory systems being adopted. Additionally, 3PL (Third-Party Logistics) providers are expanding to offer better distribution solutions.

⁸ Pipeline transportation (NAICS 486)

Talented Workforce and Reputable Institutions for Education and Training: The province has many post-secondary programs that support the needs of its growing transportation and logistics sector. Unique programs and certifications provided by the province's universities, polytechnics, and colleges support all aspects of transportation and logistics as well as other sector partners like maintenance, automation, and information technology (IT).

C. Current State of Rocky View County's Key Subsectors

Rocky View County is a growing transportation, logistics, and warehousing hub. The region provides producers with a direct local link to distribution channels, which in turn facilitates an efficient, and cost-competitive movement of goods. Furthermore, several short and long-haul transportation companies have set up operations in the County.

C.1 Warehousing and Storage (NAICS⁹ 493)

The warehousing and storage industry group is comprised of establishments that are primarily engaged in operating general merchandise, refrigerated and other warehousing and storage facilities. For example:

- General warehousing and storage
- Refrigerated warehousing and storage
- Farm product warehousing and storage
- Other warehousing and storage

Warehousing in Rocky View County is predominantly facilitated through distribution centres, fulfillment centres, and third-party logistics (3PL) providers, which support a diverse range of industries, including:

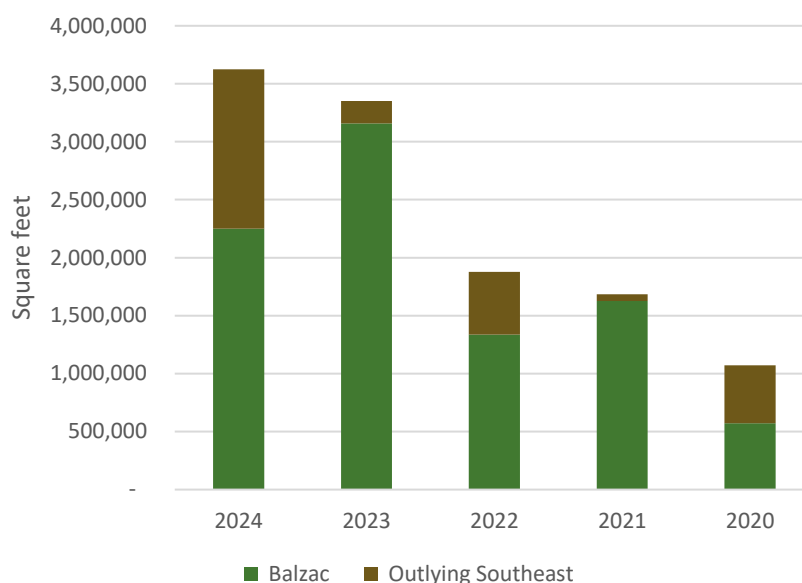
- Retail and e-commerce
- Food storage and agriculture
- Manufacturing and automotive
- Energy and industrial supplies

This industry group is driving investment in infrastructure, industrial parks, and transportation networks in Rocky View County. For example:

- At the beginning of 2025, \$68.9+ million worth of distribution centres and warehouses are under construction in Rocky View County.
- Walmart Canada opened its first high-tech fulfillment centre in 2023 in Rocky View County. Their \$100 million investment in a 430,000 ft² means they can provide 2-day shipping to 97% of Canadian households.
- Amazon built its first fulfillment centre in western Canada in Balzac in Rocky View County.
- Keurig Dr. Pepper Canada expanded its distribution capabilities in 2024 through an agreement with XTL Group for the lease of 100,000 ft² in their new warehouse in Balzac.
- Dollarama purchased 91 acres of land in the High Plains Industrial Park in 2024 with the intention of developing a distribution centre – a \$450 million proposed investment.

⁹ NAICS = North American Industry Classification System

Figure 2: Yearly Industrial Construction Completions in Square Feet in Balzac and Southeast Rocky View County¹⁰



***Rocky View County had \$1.3 billion in new assessment in 2023.
Most of this came from the warehousing sector in Balzac.***

As many of the developments are newly built, they are modern and state-of-the-art in terms of energy-efficiency and sustainability. They are also incorporating robotics, data and analytics, plus automated material handling systems which provide faster order processing, increased shipping accuracy, and enhanced worker safety.

“In addition to expanding our already significant distribution footprint in Canada, the decision to establish our operations in this new distribution centre in the Calgary region marks a major milestone in our growth and innovation journey.

This multi-million-dollar investment over the next five years underscores our unwavering commitment to providing exceptional service to our customers in Western Canada. This new collaboration with the XTL team will also enable us to improve the flexibility and responsiveness of our operations from the Port of Vancouver.”

~ Carl Saba, Vice-President of Supply Chain & Operations, Keurig Dr Pepper Canada

¹⁰ Source: JLL. Calgary & Area. Industrial Insights, Q4, 2024, 2023, 2022, and 2021.

"We are thrilled to expand our operations with the new distribution center in Western Canada. This investment demonstrates our commitment to meeting our customers' evolving needs, providing solutions to support their challenges in today's healthcare environment, and ensuring timely and efficient delivery of critical medical supplies across the country."

~ Ernie Philip, President of Medline Canada, Corporation

"We are tremendously proud to be investing in a new fulfillment centre in the Calgary area that will create jobs, boost the economy and deliver quicker service for our customers. This modern facility will provide our associates with the latest logistics technology to improve our supply chain. That means more products available, more orders fulfilled and more Canadians offered two-day shipping. This is how we're transforming our operations to meet the needs of Albertans and all Canadians."

~ Horacio Barbeito, President and CEO, Walmart Canada

Sample of Organizations in Rocky View County:

- AF Cold Storage
- Alexandria Moulding
- Amazon
- Campbell's Canada
- Conagra Brands
- Crane Worldwide Logistics
- DB Schenker
- Fenix Outdoor Import Canada
- Go Direct Solutions
- Gordon Food Service
- Home Depot
- JFC International Inc.
- Keurig Dr. Pepper Canada
- MAPEI Canada
- Medline
- Metro Supply Chain
- Modern Sales CO-OP
- MOBIS Parts
- Mueller Canada
- Pacific Coast Distribution Ltd.
- PetSmart
- Pet Valu
- Pratts
- Princess Auto
- Purity Health Products
- RONA/Lowe's
- Smucker's Canada
- Stevens Company Ltd.
- Sobeys Distribution Centre
- Stryder Canada
- Sysco
- The Bolt Supply House
- The TDL Group Corp. / Tim Hortons Distribution
- TOC Logistics
- Walmart Logistics – Fresh Food Distribution Centre
- Walmart Canada Logistics
- Whirlpool Canada
- XLT

Potential Opportunities within Rocky View County:

- **Cold storage facilities** are growing globally to support food and pharmaceutical industries. As the Alberta population increases, so does the need for additional capacity for cold-storage facilities.
- **3PL (Third-Party Logistics) providers** are experiencing growth in Canada as businesses look to outsource logistics operations in order to remain agile and cost-effective. Increasingly complex supply chains, and surging e-commerce demand, means more businesses are looking for the scalable solutions that 3PL providers can deliver.
- **Energy-efficient and sustainable warehousing.** New warehouse and builds in Rocky View County are incorporating features such as:¹¹
 - Enhanced thermal rating throughout roof and building envelope
 - Solar-ready roof structure
 - Motion-activated LED high-bay lighting
 - EV conduit installed to passenger parking areas
 - Use of low VOC emitting construction materials
 - Non-irrigated landscape
 - Use of drought-resistant plant material
 - White roofs to limit heat absorption and reduce energy costs
- **Warehouse Management Systems.** Software solutions to track inventory and manage operational processes of warehouses along with automations and robotics are being used to improve efficiency, accuracy, and speed in order processing and logistics.



¹¹ List developed by Hub Logistics Centre.

C.2 Truck Transportation (NAICS 484)

Truck transportation is the largest industry in Canada's transportation sector in terms of both GDP and employment. The Calgary area is a major distribution centre for ground transport. The County is at the epicentre of major east/west and north/south highway routes:

- Trans-Canada Highway which connects eastern and western Canada.
- Highway 2 (QE II), a north-south highway which forms part of the CANAMEX corridor that connects northern Canada with the US and Mexico.

Several of Canada's largest for-hire trucking fleets have established a presence in Rocky View County. For example, Bison Transport, Canada Cartage, and Charger Logistics offer over 60 acres of truck transport facilities to provide full truck load (FTL) and less than truckload (LTL) services to several warehouse tenants in the High Plains Industrial Park alone.

Sample of Truck Transportation Companies in Rocky View County:

- | | |
|------------------------------|------------------------------|
| • ABF Freight | • Kindersley Transport |
| • Arnold Bros Transport | • Kleysen Group of Companies |
| • Bison Transport | • Orlicks Inc. |
| • BNN Transports Ltd. | • Osprey Hauling and Hotshot |
| • Boots Transport Ltd. | • RIG Logistics Inc. |
| • Canada Cartage | • Road Runner Freight Inc. |
| • Caravan Group of Companies | • Rockline Transport Ltd. |
| • Charger Logistics | • Rosenau Transport Ltd. |
| • CN Trucking | • Shark Group of Companies |
| • Falcons Trucking Ltd. | • Syndicate Transport Ltd. |
| • Freight North Carriers | • Tri-Line Carriers |
| • Griffin Logistics Ltd. | • Trivee Transport |
| • Jaguar Freight Inc. | • XTL |

Services Provided:

- General freight trucking, local (27)
- General freight trucking, long distance, truck-load, local (34)
- General freight trucking, long distance, less than truck-load, local (5)
- Bulk liquids trucking, local (5); long distance (1)
- Dry bulk materials trucking, local (14)
- Other specialized freight (except used goods) trucking, local (11)
- Dry bulk materials trucking, long distance (9)
- Other specialized freight (except used goods) trucking, local (11)

Business counts provided in brackets¹²

¹² Statistics Canada. Table 33-10-0719-01 Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, June 2023. See Appendix A for description.



Potential Opportunities within Rocky View County:

- **Temperature controlled or refrigerated transport** is growing. The growth for cold chain shipping is driven by demand for fresh and frozen food, growing pharmaceutical and biologics industry, and general expansion of e-commerce.
- **Digital technologies** such as electronic logging devices are helping to bring transparency, efficiency, and better communication channels between carriers, drivers, and customers.
- **Data analytics and artificial intelligence (AI)** are becoming more prevalent in transportation industry, particularly in the field of the trucking business. AI can assist with fleet management leading to improved and more preventative repair and maintenance which reduces costly uncertainties. Intelligent temperature control systems that use advanced sensors and automation can monitor temperature fluctuations in real time. With the use of machine learning algorithms, these systems can predict temperature variations and make necessary adjustments to prevent spoilage.
- **Safety innovations and advanced driver assistance systems (ADAS)** are helping to prevent accidents and optimize fuel efficiencies. ADAS include technologies like collision avoidance, lane keeping assist, blind spot monitoring and 360-degree cameras, electronic stability control, and automatic emergency braking. These innovations are increasing the demand for ADAS retrofitting and aftermarket installation services.
- **Green and sustainable practices.** Evolving environmental standards and the desire to reduce trucking emissions is leading to the emergence and integration of electric and/or hydrogen trucks.
- **Supporting Activities.** The industry relies on essential services such as motor vehicle towing, wash bays, fueling stations, rest stops, and maintenance, repairs and operations to ensure seamless functionality.

Alberta Zero-Emissions Truck Electrification Collaboration (AZETEC) Project.

Led by the Alberta Motor Transport Association and funded through Emissions Reduction Alberta, AZETEC is a first-of-its-kind industry-led project that involve the designs, manufacture, and testing of two long-range heavy-duty hydrogen fuel cell (FCEV) trucks for operation year-round on Alberta's QEII, between Calgary and Edmonton.

The project positions Alberta as global leader in the creation and use of low or zero-emission transportation fuel.

Industry Associations and Supports:

Table 1: Business Associations

Industry Associations and Supports:	
Alberta Motor Transport Association (AMTA)	A province-wide, not-for-profit association, the AMTA is an advocacy and safety training association for the commercial transportation industry.
Canadian Trucking Alliance (CTA)	A federation of provincial trucking associations (including the AMTA).
Canadian Council of Motor Transport Administrators (CCMTA)	CCMTA is an incorporated body that coordinates matters dealing with the administration, regulation and control of motor vehicle transportation and highway safety. Membership includes representation from provincial and territorial governments as well as the federal government of Canada.
Canadian Industrial Transportation Association	The Canadian Industrial Transportation Association is an international association of industrial and commercial buyers of transportation services.
Canadian Transportation Equipment Association	The Canadian Transportation Equipment Association promotes excellence in commercial vehicle manufacturing through the development of standard practices and encourages research and development programs to improve component and vehicle design.
Freight Management Association of Canada	The Freight Management Association of Canada is a national industry association that promotes legislation through advocacy focusing specifically on freight transportation issues. Their primary role is advocacy on behalf of the buyers of freight transportation with all levels of government, carrier groups and with foreign governments and agencies.
Trucking HR Canada	A national, non-profit organization, Trucking HR Canada advances modern human resource (HR) solutions for the trucking and logistics workforce by collaborating and partnering with a network that including industry associations, government departments and industry professionals to ensure Canada's freight transportation network has the skilled workforce needed.

Because a shortage of drivers is a major challenge faced by the truck transportation industry, several government programs and supports have been provided to help offset the cost of providing training to operators.

Table 2: Funding Programs to Help Train Truck Drivers

Funding Program:	
Canada-Alberta Job Grant (CAJG)	<ul style="list-style-type: none"> • CAJG is an Alberta government funding program that offers training grants to employers. • Through the program, companies may receive non-repayable funding from the government to purchase third-party business training programs, including training for in-demand skillsets. • Training is expected to improve the employability and value employees can provide; new hires in these training sessions can also maximize funding potential.
Driving Back to Work program (DBTW)	<ul style="list-style-type: none"> • DBTW supports unemployed and under-employed Albertans in obtaining a Class 1 driver's licence by covering more than 90% of training and testing costs. • Albertans who are working fewer than 29 hours a week on average per year are eligible for this program.
Class 1 Experience and Equivalency (E&E) Mandatory Entry Level Training (MELT) Application	<ul style="list-style-type: none"> • The Class 1 E&E program provides experienced Class 3 license holders seeking to obtain a Class 1 driver's licence with basic Class 1 driving theory and procedures; promote positive driving attitudes and to guide the instructor on how to effectively deliver the training. • While elements of the Experience and Equivalency Class 1 MELT program relate to a variety of work environments, additional on-the-job training and supervision by an experienced commercial truck driver will assist drivers in developing advanced Class 1 driving skills after successful completion of this course.
Federal Driver Training Grant	<ul style="list-style-type: none"> • The Federal Driver Training Grant offered through Trucking HR Canada covers up to \$10,000 for driver training, and wage incentive of up to \$10,000 to cover any onboarding or finishing/mentorship training. The employer's responsibilities include ensuring eligibility criteria are met.

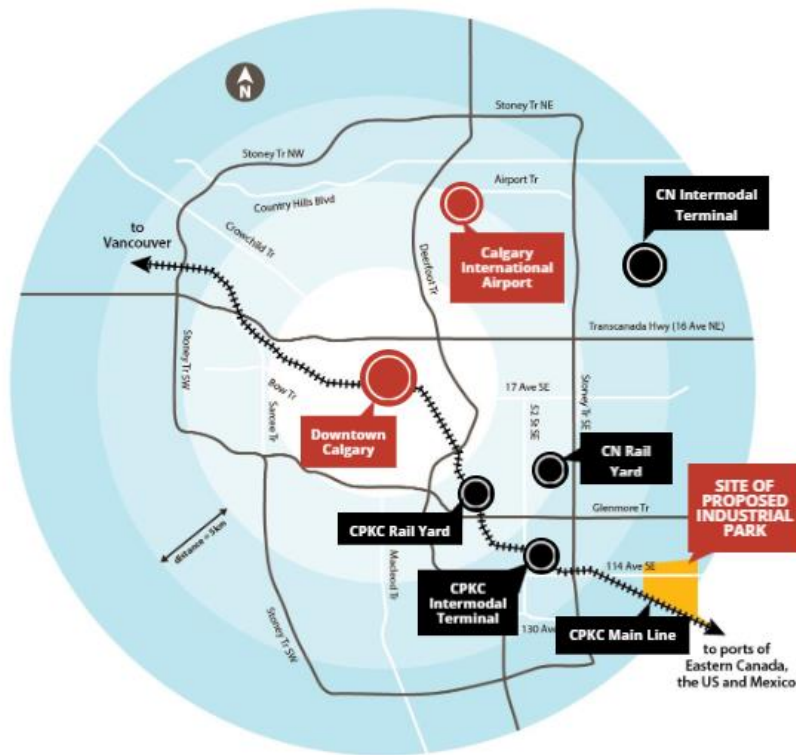
C.3 Rail Transportation (NAICS 482)

Historically, over 90% of rail transportation industry revenue in Canada comes from freight. Canada's two class one rail lines have a "coast-to-coast" rail network. Rocky View County provides excellent access to both these rail lines, CN Rail and CPKC – making the area a critical hub for intermodal, bulk, and general freight movement.

These rail lines connect Alberta to global markets. Both rail lines provide rail access to and from the Port of Vancouver, Canada's largest seaport, and ports in Eastern Canada.

Five rail facilities currently exist in the area to support the movement of products through the Canadian transportation network. Major intermodal yards provide efficient rail-to-truck and truck-to-rail transfer. Two intermodal and three transload facilities are connected with CN Rail and CPKC Rail lines. The region allows interchange between both CN and CPKC which facilitates cargo movement across North America and to Canada's seaports which serve as key gateways for global trade.

Figure 3: Map of Intermodal and Transload Facilities

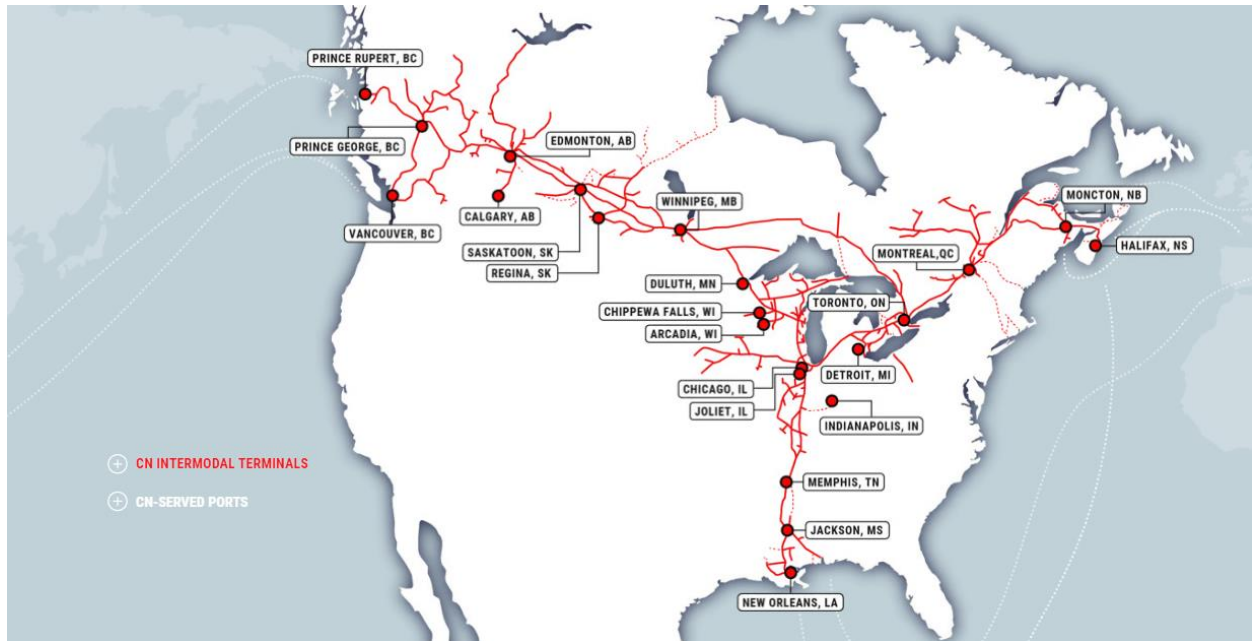


CN Rail

Canadian National Rail (CN Rail)'s Calgary network connects to its transcontinental mainline, linking the region to Edmonton, Vancouver, and Eastern Canada.

CN Rail's main intermodal terminal, the **CN Logistics Park**, is in Rocky View County at Conrich. It is a growing, state-of-the-art logistics hub designed for intermodal transfers, warehousing, and distribution.

Figure 4: Map of CN Intermodal Terminals



CN Rail operates the only rail link between Prince Rupert and Calgary, running through Edmonton and Jasper. This high-capacity rail corridor between Calgary and the Port of Prince Rupert, makes it one of the fastest and most efficient trade routes for Alberta's exports to global markets.

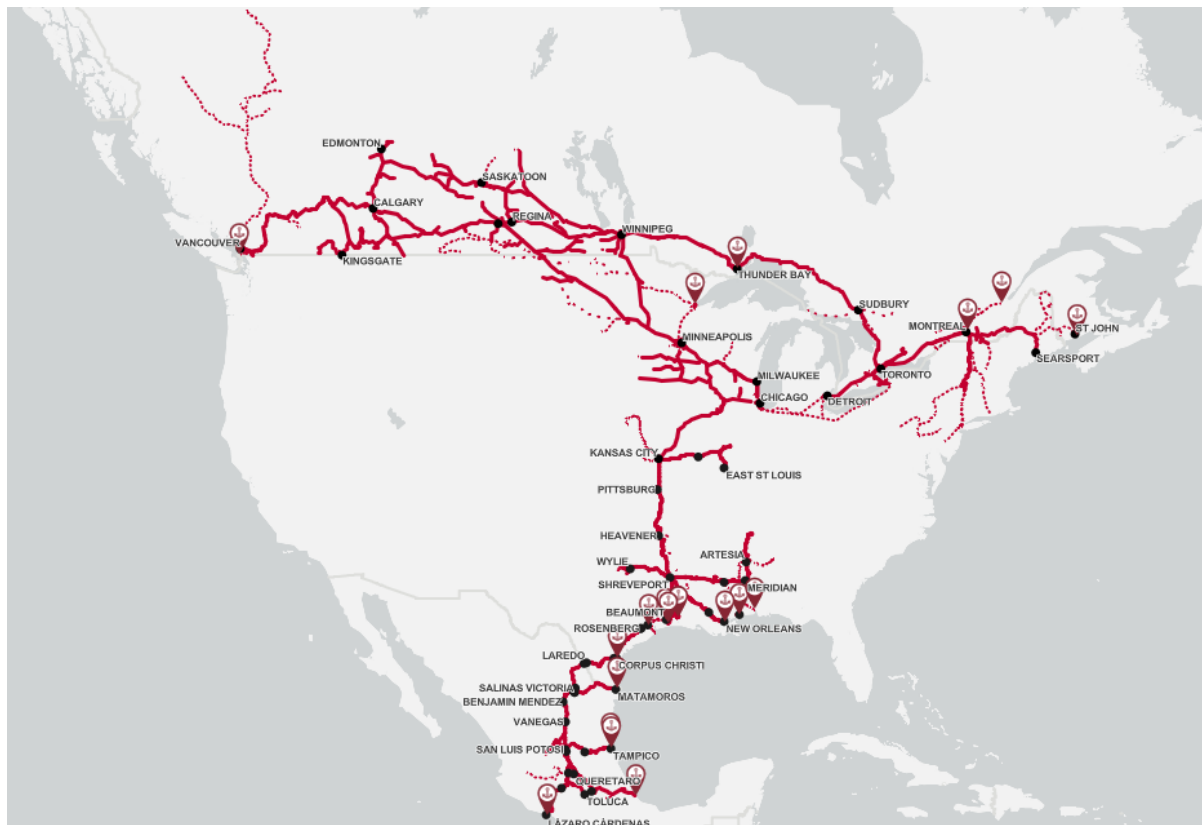


CPKC Rail

Canadian Pacific Kansas City (CPKC) is the first single-line rail network to connect Canada, the United States, and Mexico. CPKC's corporate head office is in Calgary; its North American operations are managed from this location.

The Calgary CMA is the prime connection point for CPKC cargos coming from the west coast and the Port of Vancouver to Eastern Canadian locations.¹³

Figure 5: Map of CPKC Rail Network



Rocky View County and the City of Calgary recently approved the Prairie Gateway agreement. This landmark partnership is set to generate over \$7 billion in economic activity and create more than 30,000 jobs over the next decade. The initiative will strengthen the region's role as an inland port, leveraging the CPKC rail network to expand trade, manufacturing, and logistics. By improving supply chain efficiency and reducing reliance on seaports, it will enhance economic resilience and attract new investment.

¹³ Calgary Economic Development. "Transportation & Logistics Value Proposition." Prepared by Conway Advisory. January 2021. P.9.

Potential Opportunities within Rocky View County:

- **Intermodal and Inland Port Expansion.** Limitations to interior Calgary rail facility expansion has motivated rail companies to look outside city boundaries into surrounding areas, like Rocky View County. CN's Logistics Park Railroad facility is expected to see incremental growth with new facility add-ons designed for intermodal containers originating and departing from the ports of Prince Rupert and Vancouver. The Prairie Gateway initiative will strengthen the region's role as an inland port, leveraging CPKC rail network to expand trade, manufacturing, and logistics. Industrial users will benefit from this location by access and proximity to the CPKC mainline through a number of radiating spur lines.
- **Green Transportation and Sustainable Rail Solutions.** A push for low-carbon transportation, along with rising fuel costs and trucking labour shortages make rail a more attractive long-haul option. Rail is up to 75% more fuel efficient than trucks for freight. CN Rail and CPKC are investing in hydrogen locomotives and alternative fuels consequently infrastructure for hydrogen fueling and renewable diesel production may be required as this technology develops.
- **Technology and Digital Transformation.** AI, IoT, and blockchain can all be incorporated to help modernize rail operations. These technologies can be used for real-time tracking of freight, predictive maintenance and supply chain optimization. Many rail yard and terminal operations are becoming increasingly automated.
- **Supporting activities.** Supporting activities such as container loading or unloading, locomotive and railroad car repair, and cleaning of railcars along with track and crossing maintenance may create opportunities for development within Rocky View County.

RAYHAWK

RAYHAWK autonomous railcar loading solutions integrates computer vision, machine learning, and autonomous operations to ensure safe and efficient rail loading operations.

CN Rail's Autonomous Track Inspection Program

CN Rail has leveraged autonomous inspection systems (ATIP). These state-of-the-art sensing technologies and advanced analytics inspect track at revenue speeds. A fleet of fully automated rail cars that employ wireless communications to test and monitor real-time geometric track parameters and track asset condition assessments without interrupting normal railroad operations. With its ATIP cars powered by solar panels and a generator and travelling at revenue service track speed, CN achieves 24/7/365 track inspections with these completely self-sufficient and autonomous test platforms.¹⁴

¹⁴ <https://www.cn.ca/en/stories/20220217-atip>

C.4 Air Transportation (NAICS 481)

Rocky View County is adjacent to one of Canada's busiest and best-connected airports, the Calgary International Airport (YYC). The Springbank Airport (YBW) is located on the west side of the County. Both airports are managed and operated by the Calgary Airport Authority.

Calgary International Airport is a connecting hub for cargo services between North America, Asia, and Europe. YYC's four runways can handle some of the world's largest planes. In 2023, YYC saw 4,946 cargo landings and had a passenger volume of 18.5 million passengers.¹⁵ Distribution companies such as FedEx, Purolator, UPS and DHL have cargo centres at the airport.

Springbank Airport is a regional hub for aircraft and helicopter flight training and other aircraft operations which generate regular arrivals and departures by piston and light jet aircraft. During forest fire season, YBW serves as a base for air tanker fire suppression aircraft. It is Alberta's second busiest airport in terms of aircraft movements. There were 129,674 aircraft movements in 2022.¹⁶

Sample of Businesses at Springbank Airport:

- Blackcomb Helicopters
- Calgary Flying Club
- Cavalier Aviation Ltd.
- Chinook Aviation Inc.
- Foster Aircraft
- Genesis Helicopter Services Inc.
- Great Slave Helicopters
- Guardian Helicopters
- King Airways
- LR Helicopters
- Mount Royal University Aviation
- Mountain View Helicopters
- Great Slave Helicopters
- Norther Avionics
- Rocky Mountain Aircraft
- Springbank Air Training College
- Stealth Aviation

Potential Opportunities within Rocky View County:

Alberta's aerospace revenue is projected to increase to \$4.73 billion by 2030 and employment is forecasted to grow nearly 60%, according to a study completed by KPMG in May 2024.¹⁷

- **Aircraft maintenance, repair, and overhaul (MRO).** MRO is an area with increased demand as global fleets grow. Lufthansa Technik (LHT), a global leader in aircraft maintenance and repair, recently announced plans to establish their Canadian headquarters at the YYC. LHT will focus on testing next-generation engines and alternative fuel types, paving the way for transformative advancements in aviation.
- **Aerospace manufacturing and advanced materials.** Alberta has expertise in composites, lightweight materials and precision manufacturing for aircraft and drones. Opportunities exist in the 3D printing, automation, and new aerospace materials for sustainability.

¹⁵ <https://www.yyc.com/en-us/about-us/facts-figures>

¹⁶ <https://www.ybw.ca/About>

¹⁷ "Calgary and Southern Alberta's Aerospace and Advanced Manufacturing Study." Prepared by KPMG. MAY 2024

- **Sustainable aviation fuels (SAF) and green aerospace initiatives.** Alberta has the tools to decarbonize and reduce emissions in aerospace rapidly. Rich agricultural resources, technology, and supportive government policies along with Alberta's existing carbon capture and storage (CCS) infrastructure. In the spring of 2024, WestJet announced that it purchased the first SAF supplied in Canada by Shell Aviation.
- **Training expertise.** Alberta has excellent flying conditions, abundant land and wide-open spaces, perfect for training commercial pilots, especially as the global aviation industry faces a labour shortage.¹⁸
- **Advanced technology and defence.** Alberta companies are developing and maintaining communications systems, software, specialized sensors, and other electronic components. The province is also leveraging expertise in geomatics, imaging and instrumentation to advance aerospace-based geomatics and scientific research.¹⁹
- **Aviation and aerospace products.** Alberta's aviation industry is expanding, and aerospace has been identified as an emerging growth sector.²⁰ The province benefits by having two of Canada's largest international airports, the Alberta Aerospace and Technology Centre at the Edmonton International Airport, and the Foremost Unmanned Aircraft Systems (UAS) Test Range in southern Alberta. Alberta companies are developing:
 - commercial drones
 - drone delivery services
 - specialized sensors
 - other electronic components.
 - imaging and instrumentation

De Havilland Canada

De Havilland Canada, a Canadian aircraft manufacturer, has announced plans to develop an aircraft plant in neighbouring Wheatland County. This facility will be called De Havilland Field and will consist of a new, state-of-the-art aircraft assembly facility, runway, parts manufacturing and distribution centres and maintenance repair and overhaul centre.

¹⁸ Invest Alberta. <https://investalberta.ca/aviation-logistics/>

¹⁹ Ibid.

²⁰ ATB Financial. "Productive diversification: Preserving Alberta's productivity advantage." August 13, 2024.

C.5 Other activities (Including support activities for transportation, NAICS 488)

Transportation and warehousing generate demand for several other activities including:

- customs brokers
- freight forwarding
- logistic services, which can include: labelling, breaking bulk, inventory control and management, light assembly, order entry and fulfillment, packaging, pick and pack, price marking and ticketing and transportation arrangement.
- packaging including pallet services
- maintenance, repairs and operations
- workforce training

Sample of Supporting Organizations in Rocky View County:

- | | |
|-----------------------------|--|
| • Anton Truck Body Repair | • J4 Ventures |
| • Channel Control Merchants | • Modern Truck and Trailer Repair Ltd. |
| • CHEP Canada | • Penske Truck Leasing |
| • DSV Solutions Inc. | • Ramsay Custom and Logistics |
| • DHL Group | • RPM Trailer Repair Services Ltd. |
| • Grahams Tire | • UMAC Express Cargo |



D. Industry Trends

Growth of e-commerce: The rise of e-commerce has revolutionized the logistics landscape, leading to a surge in demand for **last-mile delivery** services. To meet the rising demand for last-mile delivery, logistics companies are investing in innovative solutions such as electric delivery vans, drones, and autonomous vehicles.

Automation & Robotics in Warehousing: Technological innovations are transforming the logistics industry, enhancing operational efficiency and customer experience. Autonomous mobile robots and automated guided vehicles improve picking, sorting, and material transport. High-density storage solutions are using robotic systems to retrieve inventory, which improves warehouse space utilization and speeds up order fulfillment.

Supply chain complexity: The COVID-19 pandemic in 2020, exposed vulnerabilities in global supply chains which prompted many companies to reassess their supply chain strategies and invest in resilience measures. The pandemic revealed a number of gaps in terms of lack of a domestic supply chain.

Moreover, rising geopolitical tensions and concerns about being overly dependent on China for critical goods have driven a trend towards **re-shoring** and **friend-shoring** to reduce dependence on particular regions and countries. This is leading to shorter supply chains and more investment in continental (Canada, United States, and Mexico) manufacturing and logistics.

Furthermore, the combination of Panama and Suez Canal disruptions (Panama Canal has seen reduced transit due to drought; geopolitical conflicts are leading to attacks on Suez Canal traffic) are significantly impacting global supply chains, leading to increased costs, longer delivery times, and potential inflation.

Growth of food/pharmaceuticals: An increased demand for fresh food, frozen goods and temperature-sensitive pharmaceuticals is driving a major expansion in cold storage facilities and shipping. Changing consumer habits, such as convenience foods and meal kits, are increasing frozen food inventory needs. Retailers are expanding cold storage distribution centers near urban areas to cut delivery times.

Additionally, the rise of biologic drugs, gene therapies, and vaccines requires strict temperature control. Specialized pharmaceutical cold storage is needed to maintain regulatory compliance. Following the COVID-19 pandemic, warehouses are investing in advanced refrigeration technology to handle future pandemics and medical needs.

Technologies such as temperature monitoring are also growing. IoT sensors and blockchain tracking monitor real-time temperature and humidity during transit in order to reduce spoilage and ensure compliance with regulations.

Environment sustainability: Environmental sustainability has become a top priority for the logistics industry, with companies implementing green initiatives to reduce carbon emissions and minimize environmental impact. This includes electric and alternative fuel vehicles, eco-friendly warehousing, and carbon tracking and ESG compliance.

E. Rocky View County's Strategic Advantages

Located at the heart of Western Canada's transportation network, Rocky View County is the ideal location for businesses looking to establish, expand, or customize their warehousing, logistics, and distribution operations. With flexible property options, streamlined development processes, and cost-effective infrastructure solutions, Rocky View County offers a competitive business environment built for success.

E.1 Cost Advantage

A study completed by Triskele Logistics noted that companies are moving away from more expensive cities like Vancouver to optimize their supply chain and mitigate transportation costs to sustain margins. Their comparison found that supply chain costs favour the Calgary Metro Region over Vancouver when warehousing and distribution costs are factored in. The estimated cost for purchasing a warehouse for distribution is estimated to be over \$3.5 million less in Calgary compared to Vancouver.²¹

Taxes are less in Rocky View County compared to the City of Calgary. Rocky View County has one of the lowest mill rates compared to its peer counties along the QEII corridor.

E.2 Diverse Industrial and Warehousing Solutions

Unlike the one-size-fits-all industrial developments in many neighbouring municipalities, Rocky View County offers a variety of industrial property options to suit businesses of all sizes.

- Several master-built industrial parks - These parks are carefully designed to maximize efficiency, scalability, and cost-effectiveness.
- Move-in ready industrial condos – Ideal for businesses seeking immediate operational space.
- Single and multi-tenant buildings – Tailor-made solutions to accommodate growing enterprises.
- Massive warehouses and distribution hubs – Perfect for e-commerce, large-scale logistics, and supply chain operations.
- Greenfield industrial business park developments – Sites that range from a few to hundreds of acres, provide businesses the flexibility to custom-build their operations.
- Build-to-suit opportunities - Tailored solutions for warehousing, distribution, and manufacturing businesses.

***With options to lease, buy, develop, or build, businesses can choose
the option that best suits their operational model.***

²¹ "The Calgary Advantage. Landed Transportation Costs to Calgary and Distribution Costs for Outbound Traffic." Prepared by Triskele Logistics.
Page 27

Rocky View County's business parks are built to empower businesses with strategic flexibility.

Table 3: Key Industrial Parks in Rocky View County

Industrial Park	Location	Key Features
High Plains Industrial Park	Balzac	<ul style="list-style-type: none"> Over 1,200 acres of industrial area with available lots ranging from three to one-hundred acres. Home to Lowes, Sobeys, Smucker Foods Canada, Home Depot Canada, Gordon Food Service, CHEP Canada.
Citylink Logistics Centre	Janet	<ul style="list-style-type: none"> Located within the master-planned Carmek Park. Offers full municipal services including storm, sewer, and water to each building through a state-of-the-art utility corporation.
Nose Creek Business Park	Balzac	<ul style="list-style-type: none"> 5 million ft² master-planned, mixed-use commercial development. Up to 17 buildings at full build-out.
Rosemont Industrial Park	Balzac	<ul style="list-style-type: none"> 2.3 million ft² of industrial and logistics space upon full build-out.
Points North Business Park	Balzac	<ul style="list-style-type: none"> A 2.7 million ft², master-planned, multi-phase logistics park in the heart of the Balzac.
Interlink Logistics Park	Balzac	<ul style="list-style-type: none"> 2.2 million ft² of industrial and logistics space upon full build-out.
Hub Logistics Centre	Balzac	<ul style="list-style-type: none"> A 688,847 ft² Class A logistics complex located in Balzac.
Endeavor Logistics Park	Balzac	<ul style="list-style-type: none"> A 2.15 million ft², master-planned, multi-phase Class A logistics park in the heart of the Balzac.

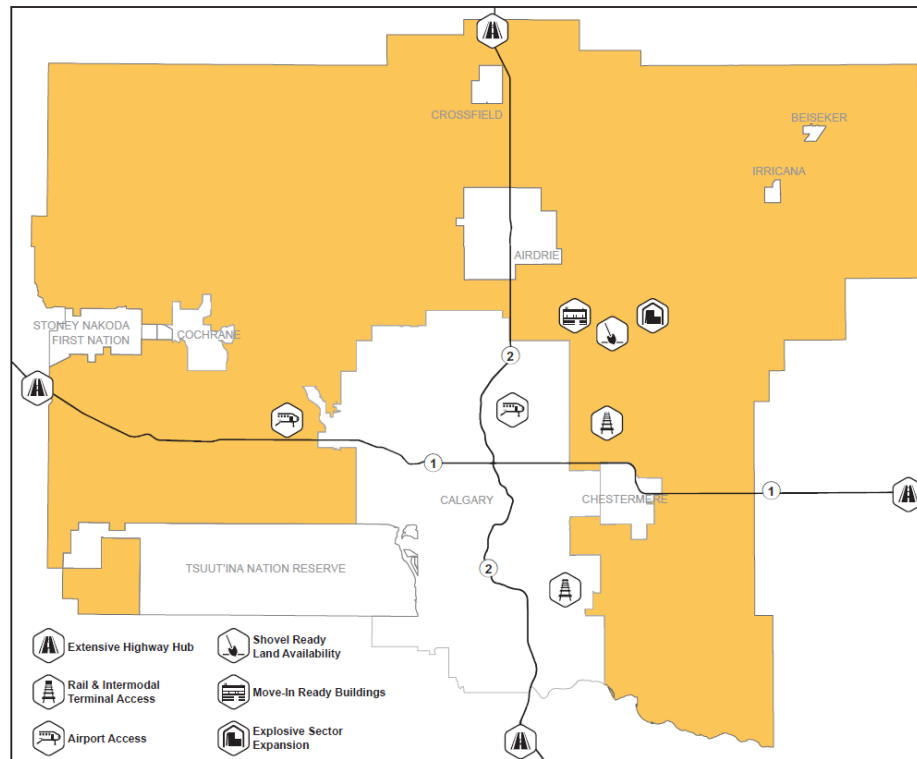
Additionally, there are 10+ logistics parks planned in the County. These parks are spread across Balzac, Conrich and Janet, capitalizing on the ample available land and easy, multimodal connectivity.



E.3 Strategic Connectivity

Rocky View County has great strategic connections via road, rail, and air. Operations in the County have good access to Calgary's Stoney Trail Ring Road which allows for easy movement around the city rather than through it.

Figure 6: Map of Rocky View County's Strategic Connectivity



E.4 Market Access

Rocky View County is strategically positioned to service a large and growing population base both locally and across North America. For example, the Calgary Metropolitan Region, with its estimated population of over 1.7 million people²² is the fastest growing major city in Canada. The County serves as a distribution hub for Western Canada efficiently reaching a total western Canadian market of approximately 13 million people. The region less than a four-hour drive north of the US border and provides access to more than 100 million consumers within a two-day trucking range.

²² Statistics Canada. Table 17-10-0148-01 Population estimates, July 1, by census metropolitan area and census agglomeration, 2021 boundaries <https://doi.org/10.25318/1710014801-eng>



Firms operating in Alberta have preferred market access to 49 countries representing approximately 1.5 billion consumers, with a combined GDP of \$49.3 trillion USD.

The County has great access to international markets via seaports, which serve as key gateways for global trade, enabling efficient movement of goods between North America and destinations worldwide. For example, the County is a one-day drive from the Ports of Vancouver (Canada's largest port) and Prince Rupert (Canada's deepest natural port).

Figure 7: Rocky View County to Ports of Vancouver and Prince Rupert



Table 4: Overview of Key Sea Ports

Overview of Key Port Access	
Port of Vancouver	<ul style="list-style-type: none"> The Port of Vancouver is Canada's largest seaport and North America's second largest export port. Port facilities handle: <ul style="list-style-type: none"> bulk commodities such as fuels, fertilizers, grains and oilseeds, feed, mineral, coal and potash breakbulk large volumes of containers automobiles
Port of Prince Rupert	<ul style="list-style-type: none"> The Port of Prince Rupert is North America's closest port to Asia by up to three days sailing—it's 36 hours closer to Shanghai than Vancouver and over 68 hours closer than Los Angeles. The Port is the deepest natural harbour in North America. There is ample room for anchorages, which results in a pilot time that is 2-6 hours less than other major Northwest ports.
Port of Thunder Bay	<ul style="list-style-type: none"> The Port of Thunder Bay and the St. Lawrence Seaway is the preferred marine route for European trade with Western Canada. The Port of Thunder Bay is a hub for dimensional and heavy-lift project cargo shipments destined for Western Canada. In partnership with CN Rail, it has the largest rail clearances to the oilsands of any Western Canadian port. It is the largest outbound port on the St. Lawrence Seaway, offering grain, coal and potash from Western Canada for export.
Port of Montreal	<ul style="list-style-type: none"> The Port of Montreal connects Western Canada to European, Mediterranean, and Asian markets via the St. Lawrence Seaway and transatlantic shipping routes. Many consumer goods imported from Europe arrive in Montreal and are shipped westward by rail. It is the largest container port in Eastern Canada. Both CN and CPKC provide direct rail links between Montreal and Western Canada.

Canada is the only G7 nation to have comprehensive free trade agreements with all other G7 members, and have preferential access across the Americas, Europe, and the Asia-Pacific region.²³ Canada has a free trade agreement with ten other countries in the Asia-Pacific region through the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).²⁴ With the CPTPP and the elimination of tariffs and non-tariff barriers, Canadian exports are expected to increase and expand across a wide range of sectors, including agriculture and non-agriculture (forestry, industrial machinery, heavy equipment and services).

²³ Government of Canada. Office of the Chief Economist. Global Affairs Canada. "2022 Canada's State of Trade: The Benefits of Free Trade Agreements." ISSN 2562-8321

²⁴ <https://agriculture.canada.ca/en/international-trade/market-intelligence/asia/cptpp/cptpp-benefits-canadian-beef-and-pork-exporters>

E.5 Industrial Land and Sites

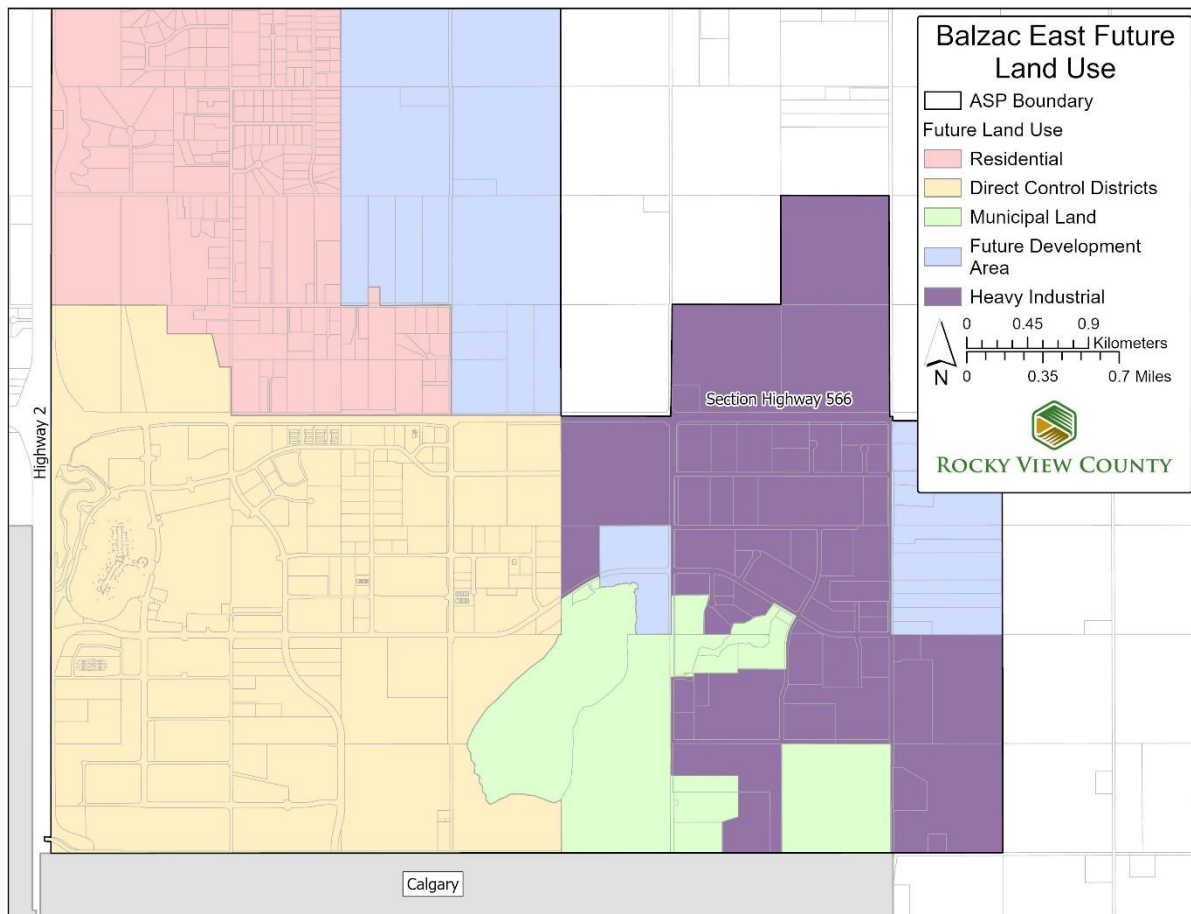
Rocky View County has several shovel-ready properties as well as many industrial properties for sale, that cater to businesses in the transportation and warehousing sector.

The County has 6 planned areas that directly support current and future industrial development.

Balzac East

Balzac East ASP is one of the most notable sites of current and future development in the County. It is made up of land to the northeast of Calgary, on the east side of Highway 2. Balzac is home to major distribution centers for retailers like Amazon, Walmart, and Sobeys. It is ideal for e-commerce and retail fulfillment with quick highway access. Undeveloped land, designated for industrial uses, is available.

Figure 8: Land Use Strategy for Balzac East

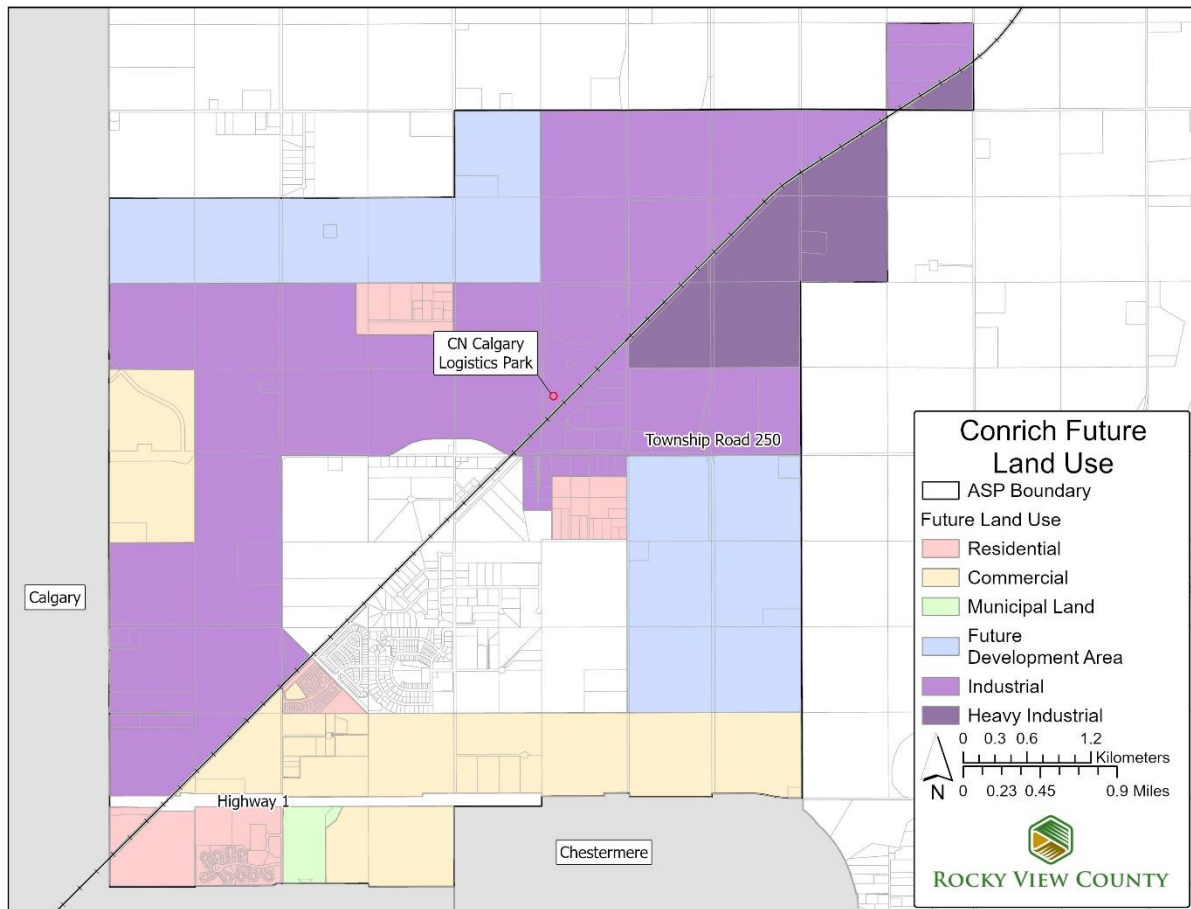


Conrich

Conrich is a small community, just outside the eastern edge of Calgary. The Conrich Area Structure Plan (ASP) lays next to the Stoney Trail Ring Road, which connects to the TransCanada Highway, and borders the City of Chestermere to the northwest. The CN Calgary Logistics Park is in Conrich, providing easy access to an intermodal rail facility, connecting with markets across North America and numerous ports. Over half of the plan area has been devoted to industrial and commercial uses.

Whirlpool Canada, Princess Auto, and the TDL Group (Tim Hortons Distribution) have all located distribution facilities at the CN Calgary Logistics Park.

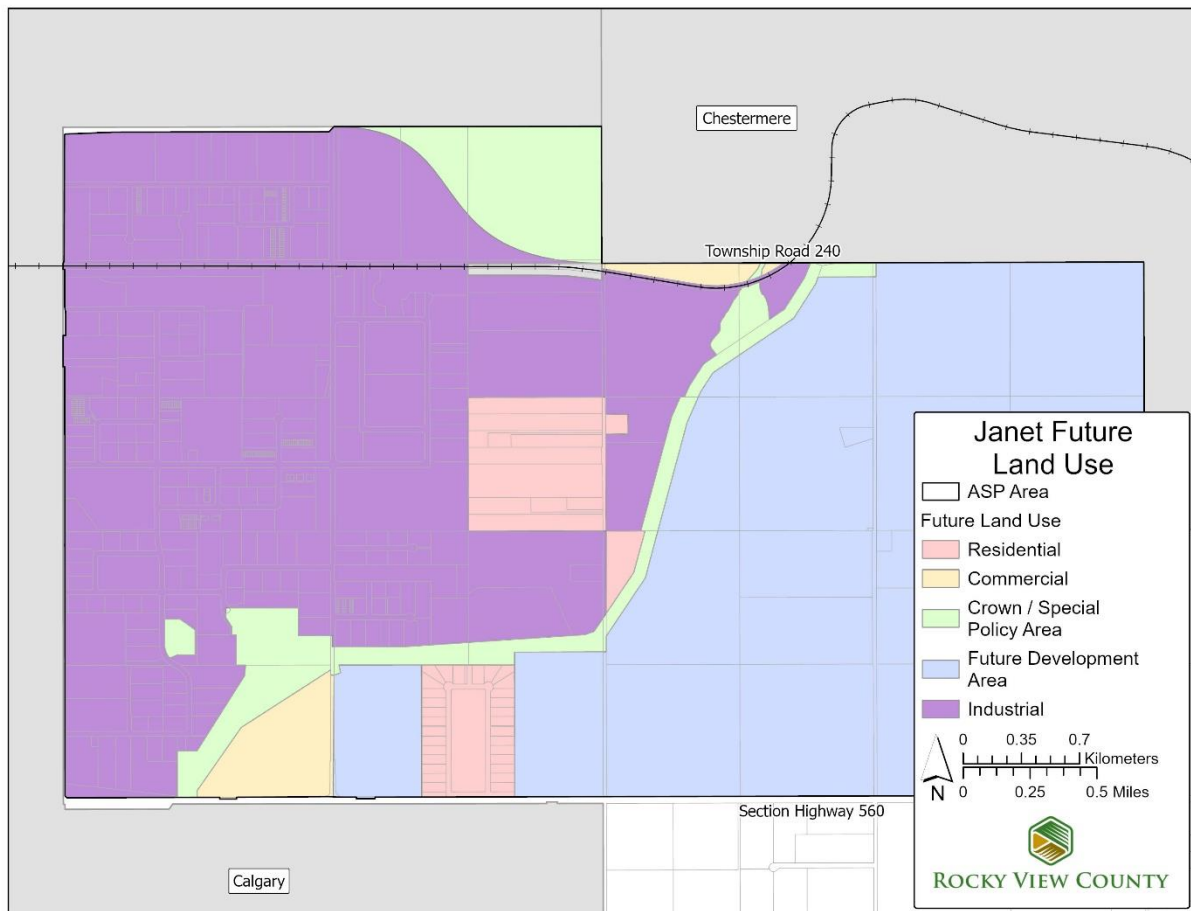
Figure 9: Land Use Strategy for Conrich



Janet

The Janet ASP is located immediately to the east of Calgary and south of Chestermere. The ASP supports the development of multiple business uses in a strategic area that is a natural extension of the adjacent industrial lands in Calgary. The area also benefits from excellent transportation access, including proximity to the TransCanada Highway and Stoney Trail, enhancing connectivity for businesses.

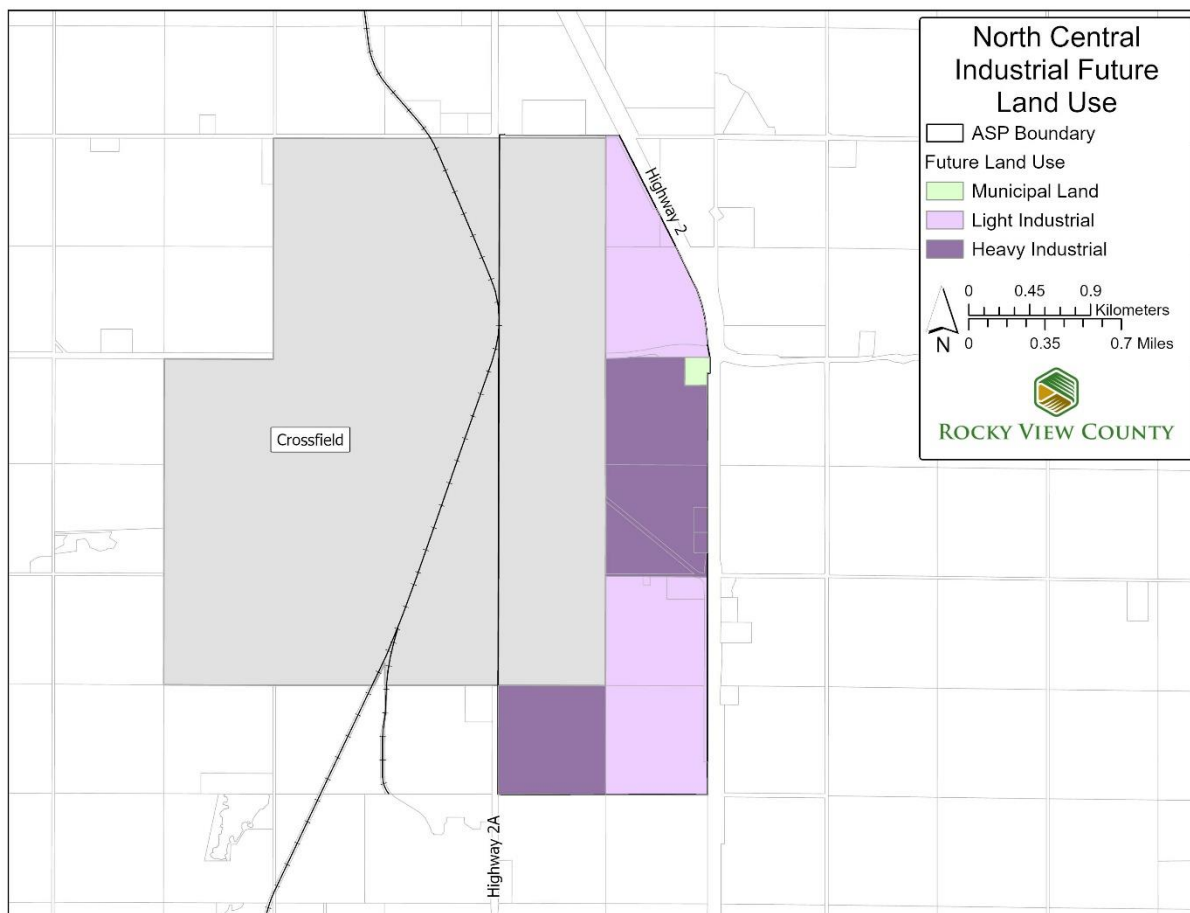
Figure 10: Land Use Strategy for Janet



North Central Industrial ASP (Crossfield)

The North Central Industrial ASP designates prime land, between the Town of Crossfield and Highway 2, for industrial uses. The land can be designated as Industrial, Heavy (I-HVY) and Industrial, Light (I-LHT) to support a broad range of industrial and manufacturing activities. The land is located approximately 30km north of Calgary and is integrated with adjacent industrial-designated land within the Town of Crossfield boundary.

Figure 11: Land Use Strategy for North Central Industrial

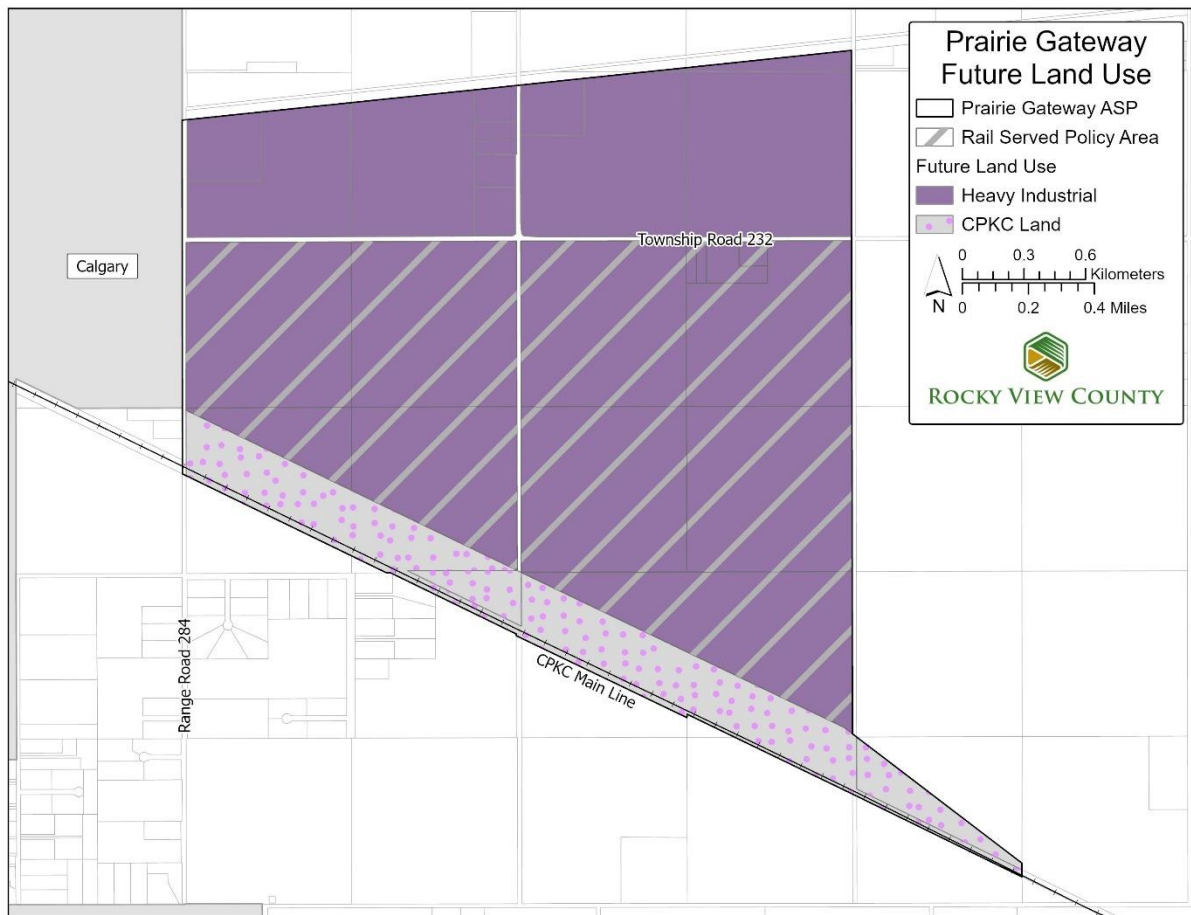


Prairie Gateway

The Prairie Gateway ASP is a collaborative project between Rocky View County, The City of Calgary, and Shepard Development Corporation. The area includes over 2,100 acres of land in the southeast sector of Rocky View County, north of the CPKC rail mainline.

The vision for the Prairie Gateway area is that it will evolve into a world-class logistics centre that supports federal and provincial initiatives to bolster the CANAMEX Corridor, and increase international trade through Canada's West Coast Ports, resulting in a significant economic development and employment generator for the region.

Figure 12: Land Use Strategy for Prairie Gateway

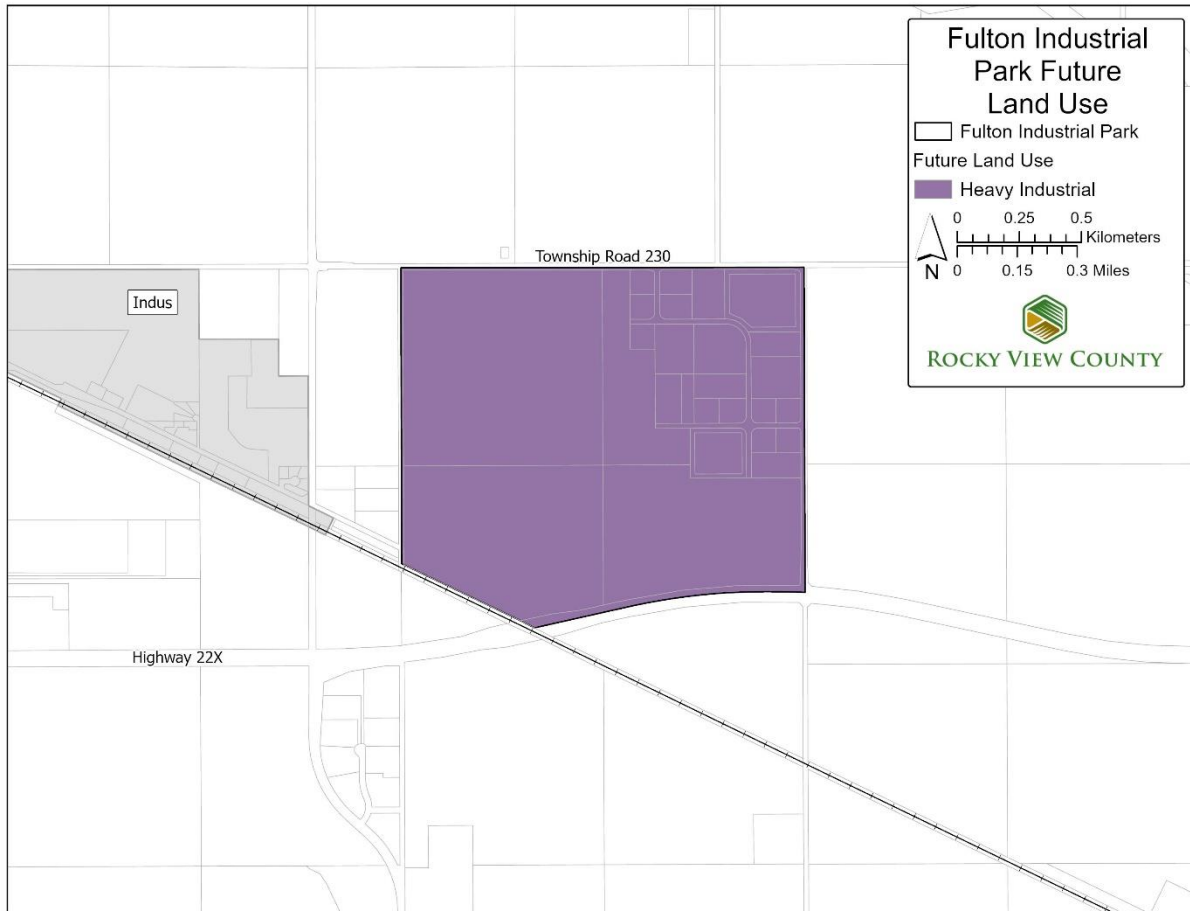


By leveraging existing transportation networks, the Prairie Gateway project aims to reinforce the region's position as a leading inland port, strengthen supply chains, drive interprovincial and international trade, and support advancing a national trade strategy.

Fulton Industrial (Indus)

The Fulton Industrial Park consists of a 523-acre master planned Industrial, Heavy (I-HVY) development, immediately north of Highway 22X, next to the Hamlet of Indus. The location is approximately 15km from the southeast corner of Calgary and is adjacent to the CPKC mainline.

Figure 13: Land Use Strategy for Fulton Industrial Park

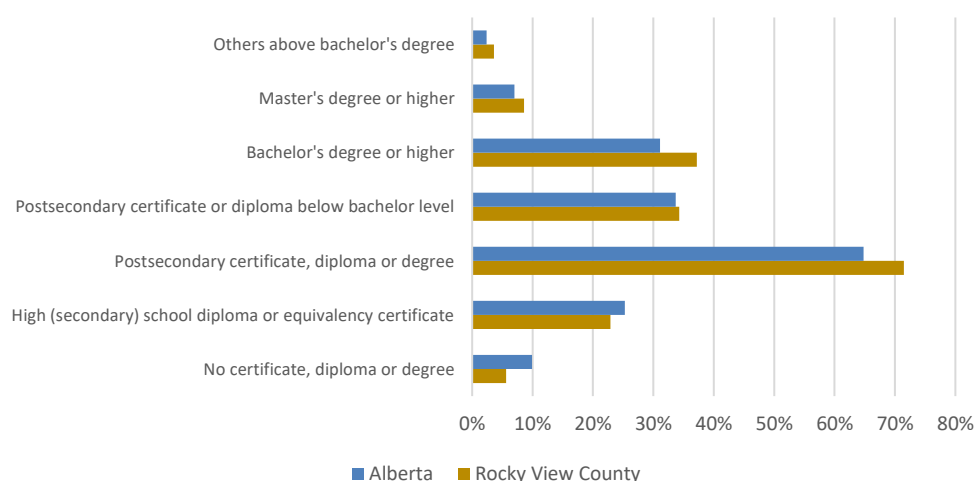


E.6 Local Labour Force

Rocky View County benefits from a skilled workforce. Beyond the County's own population of over 45,000, it also taps into a regional workforce of over 1.7 million that includes the cities of Airdrie, Calgary, and Chestermere, as well as the towns of Cochrane, Crossfield, and Strathmore, the villages of Irricana and Beiseker, and the Stoney Nakoda First Nation and Tsuu T'ina Nation. The workforce has the flexibility to choose between living in either urban or more rural environments.

Rocky View County residents are well educated – 71.5% of the population aged 25 to 64 years old has a post-secondary certificate, diploma or degree.

Figure 14: Highest Certificate, Diploma or Degree for the Population Aged 25 to 64 Years²⁵



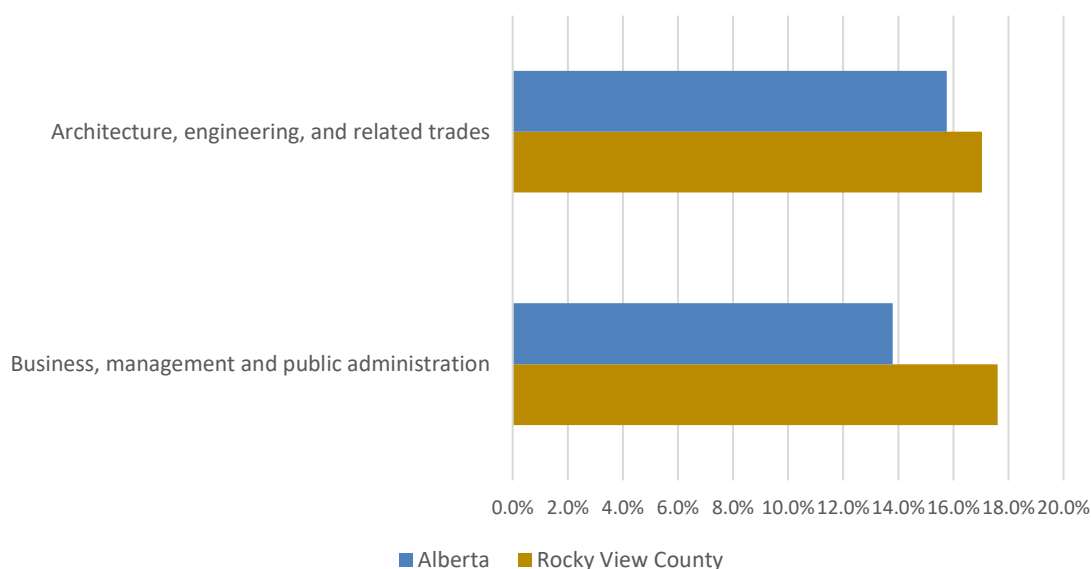
Source: Statistics Canada 2021 Census Profile.

Among residents with a post-secondary education, a higher percentage in Rocky View County, compared to Alberta overall, have specialized in architecture, engineering, and related trades, as well as business, management, and public administration.

Trades, Transportation, and Equipment Operators make up 17% of occupations in the Calgary CMA

²⁵ Statistics Canada 2021 Census Profile.

Figure 15: Major Field of Study - Classification of Instructional Programs (CIP) 2021 for the Population Aged 25 to 64 Years in Private Households



Source: Statistics Canada 2021 Census Profile.

53,540 Transportation & Warehousing Employees in the Calgary CMA

A report completed by Conway Data in 2021 for Calgary Economic Development found that the Calgary Census Metropolitan Area (CMA) has a larger concentration of employment in transportation and logistics as a whole than Edmonton (LQ²⁶ of 1.2 compared to 0.99).²⁷ It also found that in terms of sub-sector specializations, the Calgary CMA has a clear competitive advantage over Edmonton and Winnipeg in air transportation with an LQ of 2.83 although Winnipeg has a larger employment cluster in rail and truck transportation. Calgary also has a higher concentration of employment in rail and pipeline transportation than Edmonton.

E.7 Workforce Development

Nearby institutions offer a range of reputable programs that help build a skilled workforce with specialized knowledge throughout the supply chain. These programs equip professionals across various fields—such as skilled trades, supply chain management, engineering, scientists and technicians, accounting, human resources, and other business functions—with relevant training and expertise.

²⁶ Location Quotients (LQ) identify how local industries stack up with a larger comparison area. When interpreting the LQ, a LQ greater than 1.0 indicates that the area has proportionately more workers than the larger comparison area employed in a specific industry sector.

²⁷ Calgary Economic Development. "Transportation & Logistics Value Proposition." Prepared by Conway Data. P. 11.

Table 5: Sample of Regional Program Offerings

Institution	Program Offerings
University of Calgary	<ul style="list-style-type: none"> Bachelor of Commerce with a Supply Chain Management (SCMA) concentration via the Haskayne School of Business Specializations in geospatial science and engineering, as well as intelligent and autonomous systems research.
Mount Royal University	<ul style="list-style-type: none"> A concentration in supply chain management as part of its Bachelor of Business Administration (BBA). Elite aviation programs which integrate academic preparation, with commercial pilot, multi-engine, instrument, and simulator training.
SAIT	<ul style="list-style-type: none"> BBA degree with a Supply Chain Management major Business Administration diploma with a Supply Chain Management major. Engineering and Technologies diplomas such as Instrument Engineering, Mechanical Engineering, Welding Engineering, Aircraft Maintenance Engineers Technology, Aircraft Structures Technician, Avionics Technology, Heavy Equipment Technician, Parts Technician, Professional Remotely Piloted Aircraft Systems, Railway Conductor, Rail Car Safety and Securement, Track Inspection and more. Art Smith Aero Centre: This globally recognized centre for aviation training is located at the YYC Calgary International Airport. It offers immersive learning with airside access, hangar and state-of-the-art classrooms and labs.
Bow Valley College	<ul style="list-style-type: none"> Business Administration Diploma with a Supply Chain Management major. Apprenticeship-style technology diploma program.

SAIT was selected by NATO to serve as a test centre for their Defence Innovation Accelerator for the North Atlantic network.

Several post-secondary institutions exist in Alberta, for example:

- University of Alberta
- University of Calgary
- University of Lethbridge
- Mount Royal University
- Bow Valley College
- Olds College of Agriculture & Technology
- Lakeland College
- Lethbridge College
- Medicine Hat College
- Red Deer Polytech
- Northwest Polytech
- Southern Alberta Institute of Technology (S.A.I.T.)
- Northern Alberta Institute of Technology (N.A.I.T.)

Many licensed Alberta driver training schools are available throughout the region to help drivers obtain a Class 1 (tractor trailer) licence. The training uses standardized curriculums and requires a government-mandated number of training hours for in-class, in-yard, and in-vehicle modules.

There is a strong cluster of private-sector organizations in the region that provide material handling courses, safety training and certifications such as order picker, forklift, scissor and boom lift, loader and skid steer, and more.

E.8 Technology and Sustainability

Alberta is investing in innovation, particularly in areas such as automation, AI, and clean technology. These advancements enable players along the supply chain to adopt cutting-edge technologies to improve efficiency and competitiveness. The Alberta government also supports innovation through grants and incentives aimed at fostering research and development.

The Calgary region has a one of the highest concentrations of high-tech workers among Canadian cities and boasts a burgeoning tech ecosystem.²⁸ For example, Attabotics, the world's first 3D robotics supply chain system for modern commerce was founded and is based in Calgary.

*Attabotics was listed as
one of CNBC's 50 top disruptors in 2020.*

E.9 How Rocky View County Can Support

Rocky View County offers a full suite of support to all potential development partners who may have an interest in acquiring and developing land in the County. Our team of experts from Planning & Development, Engineering, Building Services and Economic Development provide a tailored approach to working with investors assisting them through the entire development process. For example, our team provides:

- Streamlined and simplified development process.
- Ongoing communication and support.
- Site selection assistance.
- Guidance on zoning, infrastructure, and other critical considerations for potential investors.

²⁸ https://tracxn.com/d/explore/food-and-agriculture-tech-startups-in-calgary-canada/_HLiEqT-6UhEoCJ4cQUdHKGLNSvLqvKUEY7TeAzXEJ8/companies

F. Incentives and Support

Rocky View County can help connect businesses with various regional, provincial, and national support organizations, as well as access to funds.

Table 6: Business, Research & Development Supports

Business, Research & Development Supports:	
Aerospace Innovation Hub	The Aerospace Innovation Hub, in collaboration with the University of Calgary, offers incubation space, equipment, accelerator programming, and a community for companies developing the next generation of technologies for the aerospace and advanced manufacturing sectors.
Alberta Machine Intelligence Institute (Amii)	The Alberta Machine Intelligence Institute (Amii) is one of Canada's three Artificial Intelligence (AI) centres of excellence and part of the Pan-Canadian AI Strategy. Amii provides support for businesses looking to integrate artificial intelligence and machine learning technologies and offers training, advisory services, and collaborative research opportunities.
Canadian Council for Sustainable Aviation Fuel Initiatives (C-SAF)	C-SAF was created by leaders from over 60 airlines operating in Canada seeking to bring together key industry stakeholders and government to accelerate the commercial production and use of Canadian-made low-carbon and sustainable aviation fuels (SAF) in Canada.
Centre of Innovation and Research in Advance Manufacturing and Materials (CIRAMM)	One of four research centres within the Applied Research and Innovation Services department at SAIT, CIRAMM helps to propel innovation across diverse industries by fostering cutting-edge digital manufacturing technologies and pioneering solutions in novel materials. State-of-the-art lab facilities include: Advanced Manufacturing, Advanced Materials Characterization, Intelligent Design and Additive Manufacturing, and Robotics and Automation.
Innotech Alberta	Innotech Alberta, a subsidiary of Alberta Innovates, provides support for research and development, commercialization, and technology adoption.
National Research Council of Canada Industrial Research Assistance Program (NRC-IRAP)	NRC-IRAP provides advisory services and funding to help small and medium-sized enterprises (SMEs) in developing and commercializing technologies.
Innovation, Science and Economic Development Canada (ISED)	ISED offers programs and services to help Canadian businesses innovate and grow by providing client-centered support to help advance research, development, and the commercialization of innovative technologies and products.

Table 6 (continued): Business, Research & Development Supports

Business, Research & Development Supports:	
Railway Association of Canada (RAC)	Railway Association of Canada (RAC) represents freight and passenger railway companies, industrial railways, and railway supply companies. RAC's mission is to work with governments and communities across the country to ensure that Canada's rail sector remains globally competitive, sustainable, and safe.
Supply Chain Canada / Alberta Chapter	Supply Chain Canada and its Alberta chapter create critical networking opportunities for supply chain professionals. Supply Chain Canada provides training, education and professional development opportunities. They grant the Supply Chain Management Professional (SCMP) designation.
Western Canadian Short Line Railway Association	An industry association that represents 20+ short line railways across British Columbia, Alberta, Saskatchewan, and Manitoba plus rail supplier partners.
Energy Transition Centre	The Energy Transition Centre, in collaboration with the University of Calgary, helps launch and scale cleantech startups with exclusive access to facilities, funding, and industry networking.
Community Futures Wild Rose	Community Futures Wild Rose is part of Community Futures Canada - a network of community economic development organizations across Canada. This not-for-profit customer service centre assists rural businesses, individuals, and communities within the region. They offer support to new entrepreneurs and existing businesses and provide flexible, affordable financing and loans.
Business Link	Business Link is a non-profit organization that helps Alberta's small businesses start and prosper. Business Link helps small business owners learn how to navigate the startup process, access market research, attend events and webinars, find online resources, and build a network. Free one-on-one coaching and advice for entrepreneurs and small business owners is provided both in-person and virtually.
Foremost Unmanned Aircraft Systems (UAS) Test Range	The Foremost Unmanned Aircraft Systems (UAS) Test Range in southern Alberta offers more than 700 square nautical miles of restricted airspace. This gives small and medium-sized firms plenty of space to test new drone technologies. It is one of only two places approved by Transport Canada to conduct beyond visual line of sight (BVLOS) testing.
Alberta Aerospace and Technology Centre (AATC)	Alberta Aerospace and Technology Centre (AATC) is a joint venture between Edmonton International Airport (YEG), Canadian North, Canadian Helicopters, Edmonton Economic Development Corporation and the Government of Alberta to build a cluster of activity in aerospace and technology around the airport. Examples of target industries include aerospace manufacturing, drone tech, satellite tech, pilot training and agri-business.

Table 7 outlines some provincial and national funding supports and incentives.

Table 7: Funding Supports and Incentives

Funding Supports and Incentives:	
Aerospace Accelerator Program	The Aerospace Accelerator Program (AAP) takes early-stage startups with technology-driven solutions to important problems and adds funding, technology development resources, professional development training and expert support. The program receives funding from Calgary Economic Development's Opportunity Calgary Investment Fund and Prairies Economic Development Canada. It is also supported by inaugural industry partners including WestJet, the Calgary Airport Authority, and Chapter AI Ventures.
Emissions Reduction Alberta (ERA)	ERA has two funding streams: <ul style="list-style-type: none"> • Technology Funding for transformative, sustainable technologies that reduce GHG emissions and positions Alberta for success in a lower emissions economy. • Energy Savings for Business helps Alberta businesses improve their efficiency and reduce emissions by supplying funding for commercial cost- and energy-saving technologies. The program is comprised of four offerings: Comprehensive Energy Savings (CES), Energy Savings for Business Program (ESB), Expanded Technologies Pilot (ETP), and the Small Producers Energy Efficiency Deployment (SPEED) stream.
Alberta Innovates	Alberta Innovates offers a variety funding programs such as: <ul style="list-style-type: none"> • Alberta Digital Traction program supports digital tech companies with software development at the core, who are looking to increase their customers, increase revenue, and scale to a global marketplace. • Hydrogen Centre of Excellence accelerates technology and innovation across the hydrogen value chain, closing innovation and support gaps and strengthening Alberta's hydrogen economy. • Carbon Capture, Utilization and Storage (CCUS) and Hydrogen program invests in projects aimed at developing and deploying innovative clean technologies, including those related to hydrogen production, transportation, storage, and end-use applications.
National Research Council of Canada Industrial Research Assistance Program (NRC-IRAP)	NRC-IRAP provides funding to help small and medium-sized enterprises in developing and commercializing technologies. They also offer the IRAP Youth Employment Program and various research grants .
Innovation, Science and Economic Development Canada (ISED)	ISED funds a number of programs and initiatives including: <ul style="list-style-type: none"> • Canada Digital Adoption Program will provide businesses with financing, tools and resources to adopt e-commerce platforms and implement digital transformation plans. • Canada Small Business Financing Program which makes it easier for small businesses to get loans from financial institutions by sharing the risk with lenders.

G. Alberta Strategic Advantages

- Alberta has the lowest tax rates in Canada. With no provincial sales tax, no payroll taxes, no health care premiums, low fuel taxes, and low personal income tax, Albertans and Alberta businesses continue to pay the lowest overall taxes, compared to all other provinces.
- The province is well regarded for its competitive business climate and efficient regulatory framework.
- Alberta's economy is growing and is expected to perform among the best in Canada.²⁹
- The province has a young, diverse and affluent population. It has the fastest-growing population with the highest median income in Canada.
- Alberta is the largest hydrogen producer in Canada and is a world leader in both hydrogen production and carbon capture utilization and storage (CCUS). Hydrogen is set to play an increasing role in consumer markets. The Alberta Zero Emissions Truck Electrification Collaboration is testing hydrogen's ability to fuel the province's heavy freight transportation sector, and CPKC is testing hydrogen fuel cell use in freight rail locomotives
- Alberta is strategically positioned in North America, with access to key markets both in Canada and the United States.
- Alberta has a well-educated and highly skilled workforce, particularly in engineering, trades, and technology. The province's education and training systems are aligned with the needs of industries like transportation, warehousing and supply chain management, providing companies with a reliable pool of talent.
- Alberta's workforce is among the most productive in Canada. The province has a high concentration of professional engineers and engineering technologists, and computer programmers.

²⁹ TD Economics. "Provincial Economic Forecast: Lower Rates, Better Fates." December 16, 2024.
ATB Financial. "Shifting Sands: Alberta's Economy in 2025 and 2025." December 18, 2024.

H. Conclusion

Rocky View County has a cross-departmental team of experts from Planning & Development, Engineering, Building Services and Economic Development willing to provide a tailored and collaborative approach to working with investors unique needs and assisting them through the entire development process.

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Appendix A: Business Register Information

The major sources of information for the Business Register are updates from the Statistics Canada survey program and from Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a universe of all business entities.

Included in the Business Register are all Canadian businesses which meet at least one of the three following criteria:

- i. Have an employee workforce for which they submit payroll remittances to CRA; or
- ii. Have a minimum of \$30,000 in annual revenue; or
- iii. Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

There are two general industrial classification categories:

- Unclassified: new category for businesses which have not received a NAICS code
- Classified: existing category for businesses which have received a NAICS code

For more information:

https://www.statcan.gc.ca/en/statistical-programs/document/1105_D16_T9_V1

Appendix B: Utility Maps

Figure 16: Conrich Utilities Map

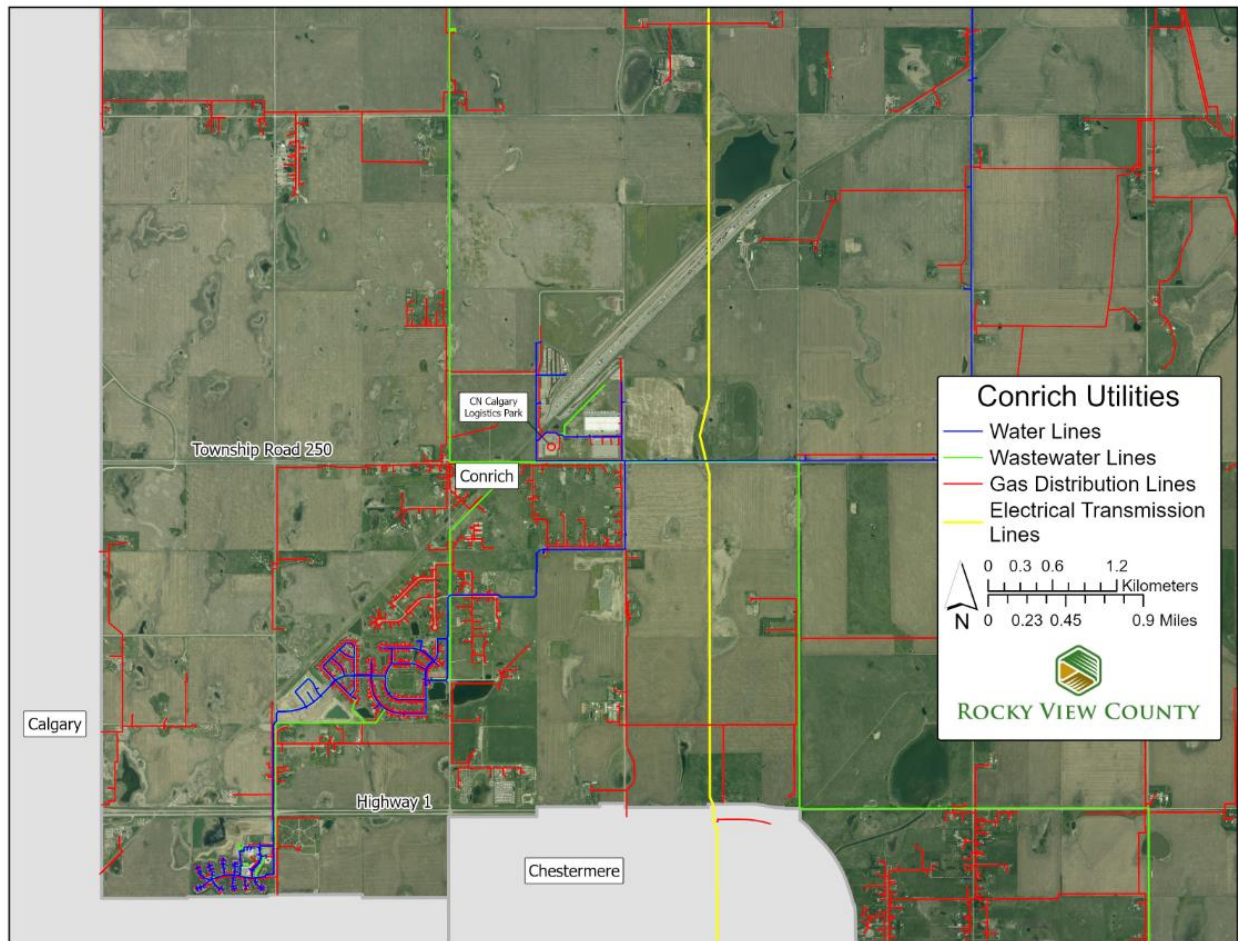


Figure 17: Janet Utilities Map

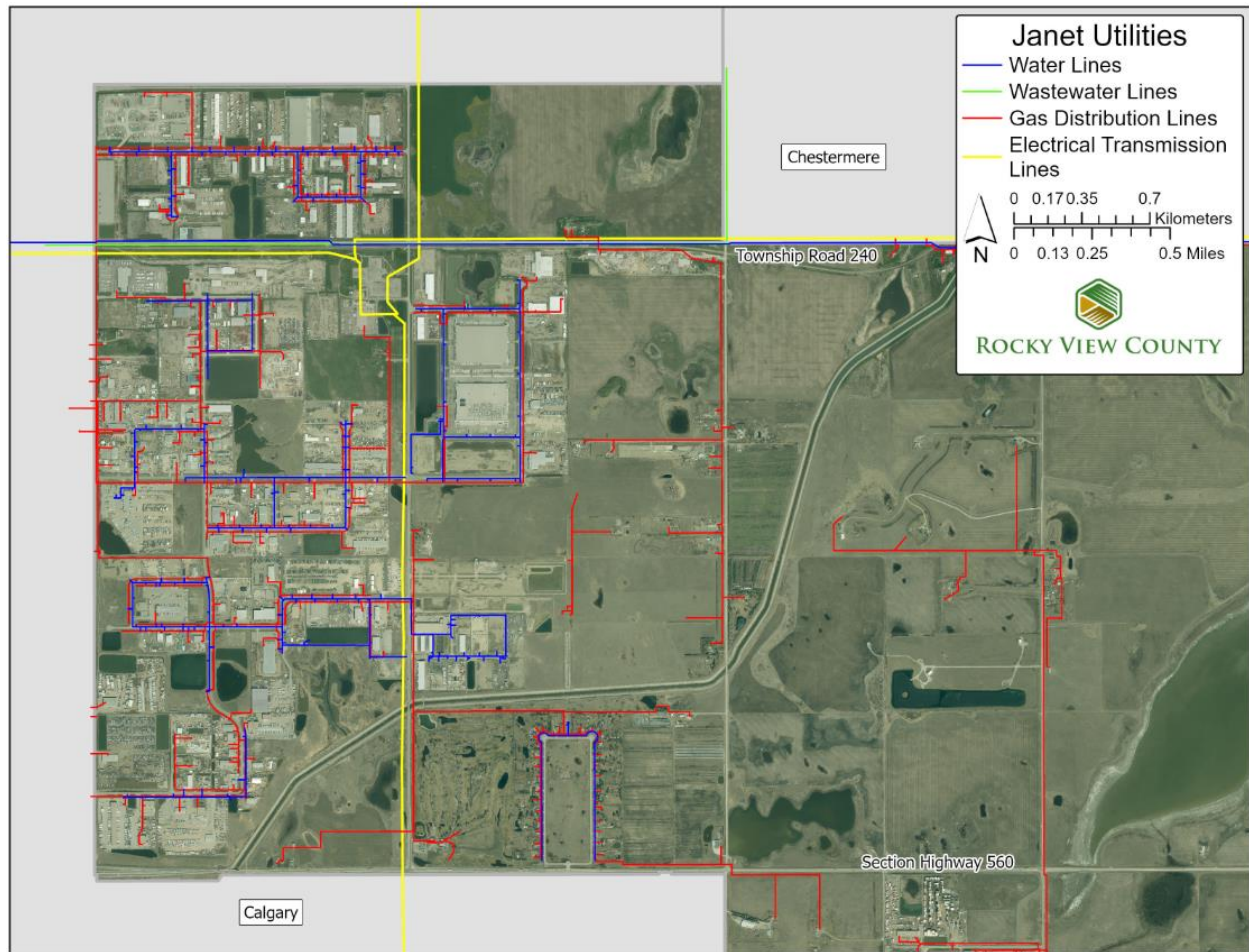


Figure 18: North Central Industrial Utilities Map

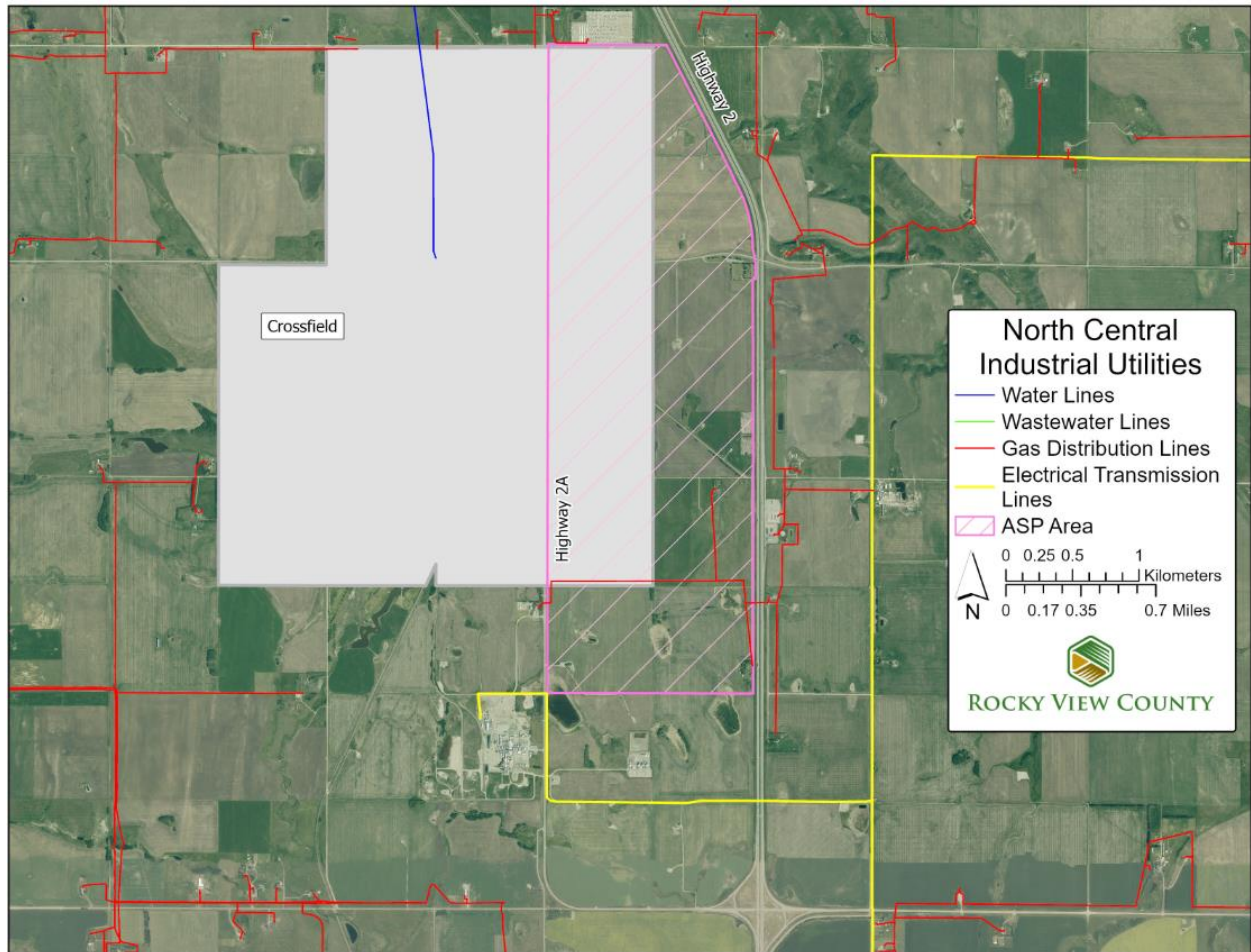


Figure 19: Fulton Industrial Park Utilities Map

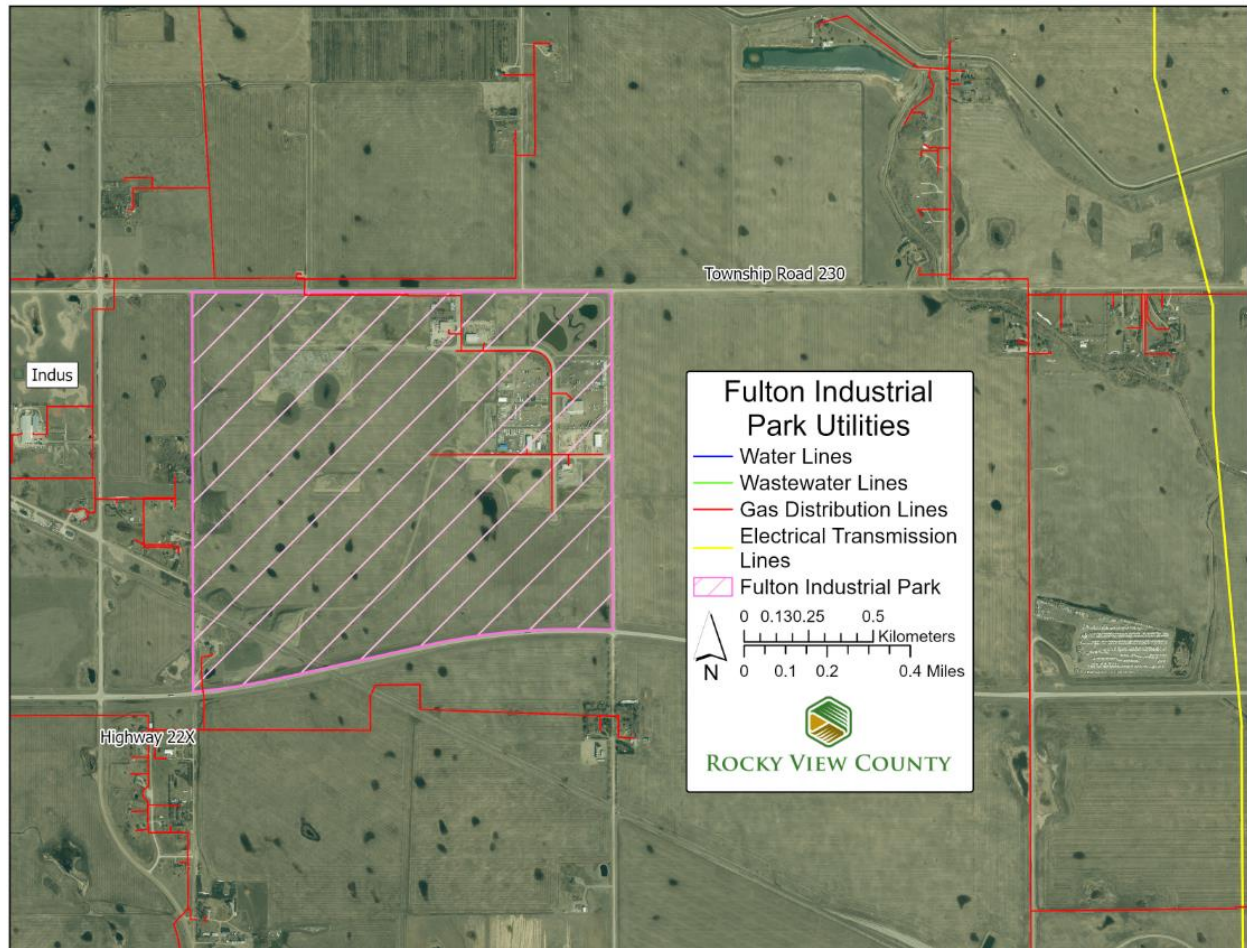


Figure 20: Balzac East Utilities Map

