OVERVIEW OF NOTEWORTHY FORUM RESULTS

VIRTUAL ROUNDTABLE – SEPT 23, 2020
PRESENTED BY: MARK FERGUSON
2020 MITL-TC VIRTUAL FORUM
ADVANCING SUPPLY CHAIN & LOGISTICS IN HAMILTON-NIAGARA REGION

1. Supply Chain Oriented Insights from Recent Hamilton-Niagara Initiatives/Research (June 17th, Moderator: Justin Terry)

2. Increasing the Competitiveness of Regional Supply Chains (July 8th, Moderator: Ken Albright)

3. Leveraging and Integrating Data for the Marine Sector (July 29th, Moderator: Keith Robson)

4. Infrastructure Improvements and the Supply Chain (Aug. 19th, Moderator: Chad Schella)

5. Round Table Discussion (Sep. 23rd, Moderator: Richard Koroscil)
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<tr>
<th>Niagara Trade and the COVID-19 Effect (Blake Landry, Niagara Region)</th>
<th>Better Understanding the Supply Chains of Niagara Region Firms (Mark Ferguson, MITL)</th>
<th>Data-Driven Precision Policy in Transportation Planning (Omar Shams, City of Hamilton and Amir Sayegh, Geotab)</th>
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<td>Niagara a trading region with trading surplus but 90% of exports stay within North America. Manufactured goods account for 90% of export value</td>
<td>General GTHA congestion (not local) rated as most important desired improvement but not via “pricing” solutions</td>
<td>2010 - first unified truck route master plan for the City of Hamilton. Now a data-driven, evidence-based update is taking place.</td>
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<td>Recent COVID survey trends: reshoring, stockpiling, protectionism, being proactive to avoid future disruption</td>
<td>Surveyed Logistics Costs of sampled firms are high; worry about high costs in the supply chain is prevalent</td>
<td>GEOTAB: Commercial vehicles like “sensors on wheels” leading to: “dynamic, always on, truck route master planning technology”</td>
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## INCREASING COMPETITIVENESS OF REGIONAL SUPPLY CHAINS (HIGHLIGHTS)

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<th>Total Logistics Cost in Canada (David Jacques, Transport Canada)</th>
<th>Planning for an Integrated Economic Zone (Marcy Burchfield, Toronto Region Board of Trade, Economic Blueprint Institute)</th>
<th>Supply Chain Trends and Potential Impacts on Shippers and Carriers (David Short, Challenger Motor Freight Inc.)</th>
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<td>Total estimated costs: $187.6 B composed of $127.7 B Transport, $52.6 B carrying costs and $7.2 B admin costs</td>
<td>“Toronto-Waterloo Innovation Corridor” an “Integrated Economic Zone.” Need to collectively address pain points and competitiveness issues.</td>
<td>Empty miles – only half of what is trucked to Vancouver comes back in loads. 60,000-person driver shortage in US another kind of “emptiness”</td>
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<td>$103 B trucking, $15B rail, $5 B freight forwarders, $2.9 B marine, $1.6 B Air</td>
<td>Flexible, Multi-modal strategic vision for the region (e.g. address issues like “lack of co-ordination” across sub-regions)</td>
<td>Especially with Electronic Logging Devices – concern with trucks being “hacked” – “Fictitious Pickups” also</td>
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**LEVERAGING AND INTEGRATING DATA FOR THE MARINE SECTOR (HIGHLIGHTS)**

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<th><strong>Automatic Identification System (AIS) Data and Marine Connectivity, (Marin Kress, United States Army Corps of Engineers)</strong></th>
<th><strong>Leveraging and Integrating Data for the Marine Sector (Ken Carey, St. Lawrence Seaway Management Corporation)</strong></th>
<th><strong>Ontario Supply Chain Visibility Project (Ian Hamilton, HOPA Ports)</strong></th>
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<td>Real time shipboard broadcast system (ship to ship and ship to shore) - temporal resolution of 6 seconds and detailed locational</td>
<td>The Seaway is linked to 41 Ports with cargo volumes only down 10-12% this year on average – major economic enabler</td>
<td>HOPA leading a multimodal integration pillar that will push data/analytical insights out for better decisions (answers to questions)</td>
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<td>Many applications apart from tracking where vessels go (e.g. dwell times, port efficiency, dredging, fog impacts etc.) – just “scratching the surface”</td>
<td>Data on Seaway Delays: 60% due to pilotage issues, 32% environmental (e.g. high winds)</td>
<td>Access to varied data including through two other GTHA pillars; Solution-based packages; no need for stakeholders to manage large data</td>
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### CBSA Perspectives on Advancing Hamilton-Niagara Supply Chains (Fred Gaspar, Canada Border Services Agency)

- Strong sense of digital infra and its importance to the supply chains; legacy systems prominent but declining: “Where does the risk lie?”

### Economic Development & Transportation Planning and Infrastructure (Norm Schleehahn and Steve Molloy, City of Hamilton)

- One of busiest industrial development periods in Hamilton of past 30 years – 1.5 million sq. feet of developments city wide; multi-modality a strong theme

### Greater Golden Horseshoe (GGH) Transportation Plan (Michael Casey, Ontario Ministry of Transportation)

- Seeking an integrated multi-modal system to support a competitive economy and communities; act as a platform for building partnerships & common objectives

- Pilot programs – “access systems of couriers to look at their data”; deliver CBSA officers into the pre-clearance commercial stream

- Pronounced AM/PM peaks on local highways have disappeared this year – telecommuting and other forms of TDM promising for efficient and sustainable outcomes

- A “Strategic Goods Movement Network” being identified and “gap analysis” shows current infra will not suffice over time
OPPORTUNITIES (L) & CHALLENGES (R)

• Niagara consolidation of northbound shipments from US carriers
• Understanding/leveraging “omni-channel” potential
• Properly co-operating to leverage data (e.g. AIS)
• Significant cost advantage of HIA over Pearson
• Getting firms the support they need to benefit from modern supply chains

• Keeping core of GTHA/GGH accessible for movements associated with outlying firms
• Managing conflicts between land uses in a congested environment
• Delivering on a mandate in the context of another agency’s infrastructure – element of complexity
• Maintaining security, confidentiality of data in a time of evolving threats
• Significant infrastructure requirements associated with nearshoring/onshoring
THANK YOU

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