Economic Impact of West Coast Ports

Prepared for
BC Maritime Employers Association (BCMEA)
BC Marine Terminal Operators Association (BCMTOA)
Nanaimo Port Authority
Prince Rupert Port Authority
Vancouver Fraser Port Authority

FINAL REPORT -- 20 August 2026

Contents

Executive Summary

The West Coast Ports are responsible for the safe and efficient movement of over $400 billion of cargo in 2025, or an average of about $1.1 billion per day.

In 2025, West Coast Ports handled nearly 50% of Canada's trade outside of North America.

British Columbia's maritime gateways at the Ports of Vancouver, Prince Rupert, and Nanaimo, serve as the backbone of Canada's total trade, facilitating the flow of goods that sustain national and provincial prosperity.

West Coast Ports provide the necessary infrastructure for diverse cargo handling, supporting national trade objectives and fostering economic growth across multiple sectors. On a cumulative basis, West Coast Ports handled over $400 billion worth of goods in 2025 or, on average, $1.1 billion worth of goods each day. Of the total $409 billion in goods value flowing through West Coast Ports in 2025, approximately $281 billion comprised international merchandise trade flows to and from Canada's trading partners outside of North America.[1,2] In total, this represented nearly 50% of Canada's total $579 billion in trade with trading partners outside of North America in 2025.[3]

Operations and activities at the West Coast Ports of Canada help to sustain an estimated 60,900 direct jobs, of which 56,200 are based in British Columbia. Direct impacts to Canada's economy include nearly $11 billion in Gross Domestic Product (GDP), and over $22 billion in economic output. Direct jobs include employment at the terminal operators, trucking, rail, cruise, and longshore workers, among many other operations within the port ecosystem that help support the movement of goods to, through and from Canada's West Coast Ports.

West Coast Ports generate significant economic activity for the nation. Total Canada-wide impacts, across direct, indirect and induced impacts, amount to approximately 152,100 jobs, generating total GDP impacts of nearly $25 billion. See **Figure ES-1**.

West Coast ports are a critical economic engine for Canada generating approx. 152,100 jobs and contributing nearly $25 billion to national GDP.

Tax impacts of marine activity at Canada's West Coast Ports also contribute over $2.6 billion in government revenues at the federal, provincial and municipal levels. See **Figure ES-2**.

[1] This figure excludes domestic and in-transit cargo shipments and all international shipments to and from the United States and Mexico. Calculation based on data from the Vancouver Fraser Port Authority and WISERTrade. For the ports of Nanaimo and Prince Rupert, it was assumed that the proportion of cargo value representing domestic, in-transit and international shipments to the United States and Mexico was the same as for the Port of Vancouver.
[2] Estimates reflect total international trade in goods only and exclude all trade in services.
[3] Statistics Canada. Table 12-10-0177-01; Canadian international merchandise trade by mode of transport, customs-based.

The ports also generate significant additional economic contributions through the many millions of dollars invested into infrastructure expansion and improvement each year. Capital expenditures at the West Coast Ports far exceeded $235 million in 2025.

Figure ES-1: Total Economic Impact of West Coast Ports Operations in Canada, 2025

Impact	Employment (Jobs)	Wages ($ Millions)	GDP ($ Millions)	Economic Output ($ Millions)
Direct – BC	56,200	$5,500	$9,250	$19,610
Indirect – BC	39,300	$3,340	$5,470	$10,880
Induced – BC	25,000	$1,480	$3,810	$5,850
Total BC	**120,500**	**$10,320**	**$18,530**	**$36,340**
Direct – Other Canada	4,700	$580	$1,590	$2,500
Indirect – Other Canada	15,100	$1,350	$2,970	$6,270
Induced – Other Canada	11,800	$850	$1,780	$3,400
Total Other Canada	**31,600**	**$2,780**	**$6,340**	**$12,170**
Direct – Canada	60,900	$6,080	$10,840	$22,110
Indirect – Canada	54,400	$4,690	$8,440	$17,150
Induced – Canada	36,800	$2,330	$5,590	$9,250
Total Canada	**152,100**	**$13,100**	**$24,870**	**$48,510**

Note: Totals may not sum, due to rounding. Monetary impacts presented in 2025 dollars.

Figure ES-2: Tax Impacts at West Coast Ports, by Level of Government, 2025

Port	Federal ($millions)	Provincial ($millions)	Municipal ($millions)	Total ($millions)
Total	**$1,716**	**$740**	**$153**	**$2,608**

West Coast Ports are critical community anchors whose contributions extend well beyond their economic role, generating meaningful social value in the communities where they operate. They have shown strong leadership in advancing economic reconciliation with First Nations, both through relationship agreements and by building lasting working partnerships. Port employees and stakeholders also contribute significant volunteer hours and monetary donations each year, helping to advance environmental stewardship, community health, and overall well-being.

1 Introduction

British Columbia's maritime gateways at the Ports of Vancouver, Prince Rupert, and Nanaimo, referred to in this report as the West Coast Ports, serve as the backbone of Canada's total trade, facilitating the flow of goods that sustain national and provincial prosperity.

Collectively, West Coast Ports handled over 200 million tonnes of cargo in 2025, which includes internationally traded goods, domestic and in-transit cargo shipments, while also serving cruise ship passengers and cruise lines. This cargo was valued at over $400 billion, meaning that, on an average day, there was around $1.1 billion worth of goods flowing through West Coast Ports.

West Coast ports handled over 200 million tonnes of cargo in 2025, amounting to around $1.1 billion worth of goods every day.

In 2025, B.C.'s maritime gateways were responsible for moving nearly 50% of Canada's total trade with trading partners outside of North America.

The West Coast Ports provide the necessary infrastructure for diverse cargo handling, helping to support national trade objectives, foster economic growth across multiple sectors and facilitate trade with Canada's diverse trading partners. West Coast Ports are a key gateway for trade with Canada's overseas trading partners and in 2025, handled nearly 50% of Canada's trade with trading partners outside of North America.

Maritime port operations encompass a vast network of businesses and stakeholders collectively involved in moving sea-shipped goods to, through and from a nation's coasts. There are a wide variety of waterfront port operations activity performed by different stakeholders, including:

- *Carriers and ship agent offices:* as local supporting personnel for the ships carrying goods and passengers to and from the waterfront.
- *Terminal operators:* the businesses managing and investing in the port terminals where the ships dock and longshore workers load/unload cargo.
- *Warehouses and transload facilities:* the facilities where goods can be stored and/or prepared for the next leg of their journey. Significant warehousing and transload operations are also located away from the waterfront.
- *Canadian Port Authorities (CPA):* Canadian Port Authorities are federal agencies that act as landlords, leasing out port operations to private terminal operators.[4]
- *Marine support service providers:* tug, tow, and barge services and ship supply providers that operate throughout the harbour.

[4] Per the definition from Transport Canada, CPAs are federally incorporated, autonomous, non-share corporations that operate at arm's length from the federal government, who is the sole shareholder.

- *Rail and truck carriers:* the ground transport providers that move sea shipments to and from the port terminals.

Marine port operations function as a unified ecosystem and set of critical gateways that link maritime transportation to other modes of transportation, such as truck and rail. The efficiency of marine port operations relies on smooth coordination of diverse stakeholders—such as shipping lines, terminal operators, and drayage providers—whose collective performance determines the overall flow of the national supply chain. As these systems are deeply interconnected, even a minor operational delay can trigger cascading impacts and significant economic disruptions that ripple through various industries far beyond the port's physical limits.

Canada’s West Coast Ports touch many key national industries, including agriculture, forestry, mining and manufacturing, helping to move raw materials and finished goods to and from markets all over the world. By helping to facilitate trade, Canada’s West Coast Ports act as a significant economic engine helping to power Canada’s economy and national prosperity.

2 Economic Benefits Generated by West Coast Ports

Canada's West Coast port activities generate strong economic benefits for Canada's supply chain and beyond moving goods and people. The substantial total value of trade handled at the three ports in 2025 is estimated, as well as the economic impact of port operations and capital expenditures broken down into direct, indirect, induced, and total impacts. The taxation impacts of ongoing operations are also estimated for the federal, provincial and municipal levels of government.

2.1 Value of Trade

In 2025, West Coast Ports handled a wide array of goods and commodities moved as international, domestic and in-transit cargo shipments. In total, the value of all the goods passing through West Coast Ports in 2025 amounted to $409 billion, or around $1.1 billion of goods and commodities each day.

The West Coast Ports are also a key gateway for trade with Canada's diverse overseas trading partners, especially in Asia.

Of the total $409 billion in trade value flowing through West Coast Ports in 2025, approximately $281 billion comprised international merchandise trade flows to and from countries outside of North America.[5,6]

West Coast ports are responsible for the safe movement of over $400 billion of cargo in 2025, or an average of $1.1 billion per day.

A key gateway for global trade, West Coast ports handled nearly 50% of Canada's trade with trading partners outside of North America.

In total, this represented nearly 50% of Canada's total $579 billion in trade with trading partners outside of North America in 2025.[7]

[5] This figure excludes domestic and in-transit cargo shipments and all international shipments to and from the United States and Mexico. Calculation based on data from the Vancouver Fraser Port Authority and WISERTrade. For the ports of Nanaimo and Prince Rupert, it was assumed that the proportion of cargo value representing domestic, in-transit and international shipments to the United States and Mexico was the same as for the Port of Vancouver.
[6] Estimates reflect total international trade in goods only and exclude all trade in services.
[7] Statistics Canada. Table 12-10-0177-01; Canadian international merchandise trade by mode of transport, customs-based.

2.2 Economic Impact of West Coast Ports Operations, 2025

West Coast Ports are major employers in Canada, directly supporting 60,900 jobs, of which 56,200 jobs are based in British Columbia — with employees earning an average of $97,900 per year, 42% above the national average.

Operations and activities at Canada's West Coast Ports support an estimated 56,200 direct jobs in BC. Direct impacts to the BC economy include nearly $9.3 billion in GDP, and nearly $20 billion in economic output. Direct jobs include employment at the terminal operators, trucking, rail, cruise, and longshore workers, among many other operations that occur within the port ecosystem that supports the movement of goods to, through and from the three West Coast Ports in Canada, as shown in **Figure 2-1**. The average wage per direct job in BC is approximately $97,900 per annum, which is 37% higher than the provincial average of $71,700 and 42% higher than the national average of $69,100 per annum.[8] Jobs at the West Coast Ports provide high-skill and high-paying employment for British Columbians.

Figure 2-1: Direct Economic Impact of West Coast Ports Operations in BC, 2025

Impact	Employment (Jobs)	Wages ($ Millions)	GDP ($ Millions)	Economic Output ($ Millions)
Direct in BC	56,200	$5,500	$9,250	$19,610

Note: Totals may not sum, due to rounding. Monetary impacts presented in 2025 dollars.

Operations at West Coast Ports also generate some direct jobs outside of BC as well – primarily in the rail transport sector. In total, West Coast Ports generate around 4,700 direct jobs outside of BC, mainly in Alberta but spread also across Saskatchewan, Manitoba, Ontario and Québec.

Including indirect impacts (impacts of downstream businesses) and induced impacts (spending of direct employees in the wider economy), total employment impacts in BC amount to 120,500 jobs (See **Figure 2-2**). Indirect jobs amount to 39,300 and induced jobs in the general economy that are generated by spending of those employed directly and indirectly amount to a further 25,000 jobs. The overall average wage is $85,600 per job, per annum, when taking into consideration indirect and induced employment types.

[8] Statistics Canada Table: 14-10-0064-01; Total employees, all industries, 2025

Considering both direct jobs generated in other provinces plus indirect and induced jobs supported across the country, the total Canada-wide impacts of West Coast Ports operations, including direct, indirect and induced categories, is approximately 152,100 jobs, earning over $13 billion in wages. GDP impacts are also estimated to be nearly $25 billion, indicating that the operations at West Coast Ports contribute significant economic activity for the nation.

West Coast port operations are significant generators of economic activity across Canada, supporting 152,100 direct, indirect and induced jobs and contributing nearly $25 billion in national GDP.

Figure 2-2: Total Economic Impact of West Coast Ports Operations in Canada, 2025

Impact	Employment (Jobs)	Wages ($ Millions)	GDP ($ Millions)	Economic Output ($ Millions)
Direct – BC	56,200	$5,500	$9,250	$19,610
Indirect – BC	39,300	$3,340	$5,470	$10,880
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Induced – Canada	36,800	$2,330	$5,590	$9,250
Total Canada	**152,100**	**$13,100**	**$24,870**	**$48,510**

Note: Totals may not sum, due to rounding. Monetary impacts presented in 2025 dollars.

2.3 Economic Impact of Capital Expenditure Investments

Continued investment in marine port infrastructure is critical for sustaining Canada's supply chains and growing trade.

In 2025, total capital investment by Canada's West Coast ports exceeded $235 million.

Annual capital investments are directed toward major infrastructure projects that are vital for sustaining British Columbia's marine port functions and accommodating expected growth in trade. Besides enhancing long-term operational capabilities, these projects generate economic benefits that are independent of, and additive to, those produced by ongoing operations as described in Section 2.2. Since capital spending typically changes year-over-year based on specific development cycles, these expenditures are considered as "one-time" economic impacts.

In 2025, the capital investment at Canada's West Coast ports well exceeded $235 million. This amount would be significantly larger when including additional investment into site-specific port terminal operations, warehousing, rail and trucking firms.

Over the years, significant capital investment from public and private sources has supported the continued development of the Vancouver Gateway. This investment has supported both the mobility of people and the efficiency of goods movement across the Greater Vancouver region, with total capital investments reaching the tens of billions of dollars in recent years. Several projects related to improving road and rail access and capacity for goods movement amount to nearly $2 billion (e.g., Roberts Bank Rail Corridor, Deltaport Road/Rail and North Shore, Shore trade corridor enhancements). There are also numerous private investment projects that contribute to this investment, that exceed $10 billion (e.g., G3 Grain Terminal, Westshore Coal, Neptune Terminal Coal and Potash). Beyond BC, key private investment projects that support goods movement through Canada's supply chain in the tens of billions of dollars (e.g., Trans Mountain pipeline, various expansions that support commodities such as oil sands, potash, and grains).

Per the Greater Vancouver Gateway Council, there has been over $100 billion invested in the Vancouver Gateway across public and private investment sources over the years to support movement of goods across Canada.

Source: https://www.gvgc.ca/assets/docs/Greater_Vancouver_Gateway_Council_Presentation.pdf

Similarly, continued investment at the Port of Prince Rupert and Port of Nanaimo supports the growth and development of their operations in several areas that are led by the port authorities and their tenants.

Capital investment, in addition to being a strategic enabler of long-term growth and capacity expansion, also generates significant economic impacts throughout the design and delivery of investment projects. For instance, as shown in **Figure 2-3**, the approximately $235 million investment across by West Coast port authorities in 2025 would have supported 700 direct jobs involved in the range of these projects, along with about $60 million in wages and $90 million in GDP. In total, after accounting for direct, indirect and induced impacts, this investment spending would have supported about 1,500 jobs, $120 million in wages and $200 million in GDP.

Figure 2-3: Economic Impact of 2025 Capital Expenditure Investment at West Coast Ports in British Columbia

Impact	Employment (Jobs)	Wages ($ Millions)	GDP ($ Millions)	Economic Output ($ Millions)
Direct	700	$60	$90	$240
Indirect	500	$40	$60	$120
Induced	300	$20	$50	$70
Total BC	**1,500**	**$120**	**$200**	**$420**

Note: Totals may not sum, due to rounding. Monetary impacts presented in 2025 dollars.

2.4 Tax Impact

West Coast Ports support $2.6 billion in taxes to all levels of government

In addition to the economic impact of jobs, wages, GDP and output by BC's ports, the ongoing operations at West Coast Ports also contribute tax revenues at the federal, provincial, and municipal levels. **Figure 2-4** shows that, in total, West Coast Ports operations provide around $2.6 billion in tax revenue each year, with around $1.7 billion (66%) in federal tax revenue,[9] $740 million (28%) in provincial tax revenue[10] and $153 million (6%) in municipal tax revenue.[11]

Figure 2-4: Tax Impacts at West Coast Ports, by Level of Government, 2025

Port	Federal ($millions)	Provincial ($millions)	Municipal ($millions)	Total ($millions)
Total	**$1,716**	**$740**	**$153**	**$2,608**

[9] Federal tax revenues include federal personal and corporate income tax, Canada Pension Plan (CPP) and employment insurance (EI) contributions, marine navigation service fees (MNSF) and gross revenue charges.
[10] Provincial tax revenues include provincial personal and corporate income tax and workplace insurance premium contributions.
[11] Municipal tax revenues include off-dock property taxes paid by the port authority along with payments in lieu of taxes (PILT) payments.

3 Beyond the Economic Impact of Canada's West Coast Ports

The West Coast Ports are critical community anchors—driving social value through employee volunteerism, charitable giving, and partnerships with local and First Nations organizations that strengthen civic ties and support education, social services, and community well-being.

3.1 Introduction

The West Coast Ports are critical community anchors whose contributions extend well beyond their economic role, generating meaningful social value through volunteerism, charitable giving, local partnerships and sustainability initiatives.

Through employee-led volunteer hours, the port community fosters a culture of civic engagement that strengthens ties between port operations and surrounding communities. Significant charitable donations made by West Coast port operators and their stakeholders help address local needs, supporting social services, education and community well-being. In addition, partnerships with community organizations, First Nations groups, and local institutions enable the port community to collaborate on shared priorities, enhancing social cohesion and creating long-term, inclusive benefits for the regions they serve. Furthermore, West Coast ports also continue to invest in environmental stewardship and marine conservation to protect the waterfront and support the region's long-term economic and ecological resilience.

In 2025, social impact investment was in the range of $50 million. The port community at large is supporting a wide variety of community organizations designed to foster greater economic collaboration as well as strategic partnerships.

3.2 Economic Reconciliation and Strategic Partnerships with First Nations

Building and fostering strong working relationships with First Nations is central to the future long-term success of the West Coast Ports and Canada's supply chain.

Collaboration with First Nations is central to creating mutually beneficial outcomes across the marine port ecosystem. Strengthening relationships with First Nations is a key driver of the long-term success of Canada's West Coast Ports.

A significant focus for the port community has been to build meaningful partnerships through direct investment into the First Nation communities in which they operate. West Coast ports have invested significantly into supporting a variety of First Nations focused and led endeavours, including cultural events, business conferences, social programs as well as educational and awareness initiatives. The port community has also established dedicated funding streams, like community involvement funds and career opportunities that are designed to foster greater economic collaboration as well as strategic partnerships.

Canada's West Coast Ports have worked to build meaningful relationships and partnerships with First Nations that extend beyond regulatory requirements, with collaboration spanning environmental stewardship, cultural protection, economic development, and shared decision-making.

Currently, the port authorities in partnership with the First Nations have numerous agreements that support economic reconciliation by creating opportunities in procurement, employment, skills development, investment and long-term investment streams for First Nations' businesses. The projects and partnerships that have resulted have delivered meaningful social outcomes while advancing and strengthening Canada's supply chain.

3.2.1 Port Authority Partnerships and Agreements

The various Relationship Agreements between the Port Authorities and First Nations work toward fostering economic reconciliation.

Across Canada's West Coast Ports, port authorities are translating this commitment into formal partnerships that deliver tangible benefits for First Nations — from equity ownership and preferred contracting to relationship agreements that shape major infrastructure projects. The following are examples that illustrate this collaborative approach in practice.

The Prince Rupert Port Authority is partnering with the Metlakatla First Nation to develop the South Kaien Import Logistics Park, a First Nations led project where the Metlakatla Development Corporation holds a majority ownership stake. This collaborative approach is anchored by previous successes where the Prince Rupert Port Authority and Coast Tsimshian First Nations secured agreements for preferred contracting, resulting in over $100 million in capital projects delivered by First Nations firms.

The Vancouver Fraser Port Authority has established a historic relationship agreement with the Musqueam Indian Band which focuses on working together collaboratively in several areas including developing employment and educational opportunities. The port authority also has a relationship agreement with Tsawwassen First Nation that is focused on treaty rights, environmental stewardship and protecting lands.[12] For major infrastructure like the Roberts Bank Terminal 2 Project,[13] the Vancouver Fraser Port Authority has finalized mutual benefit agreements with 27 First Nations to align project outcomes with local economic aspirations. The port authority also offers $200,000 in Indigenous Community Fund for projects and events within the port authority's jurisdiction.

[12] https://www.portvancouver.com/community/indigenous-relations
[13] https://www.portvancouver.com/project/roberts-bank-terminal-2

Additionally, the Nanaimo Port Authority has reached a New Relationship Agreement with the Snuneymuxw First Nation in 2020, contributing to a national movement where ports utilize formal agreements to foster economic reconciliation and shared prosperity. The agreement focuses on having a strong partnership and shared goals that are based on sustainable development. These initiatives have been mutually beneficial to all involved.[14]

3.3 Community Well-being, Culture, Tourism & Volunteerism

Over $900,000 has been contributed to various community charities, event sponsorships and volunteer hours in 2025 by the West Coast Ports community.

West Coast Ports are active community partners, investing in sponsorships, charitable donations, and volunteerism that support local healthcare and education initiatives. Notable contributions include funding for the VGH & UBC Hospital Foundation and local schools, as well as initiatives designed to enhance the overall quality of life and inclusivity within port cities. Ports play a vital role in local vibrancy by sponsoring arts and culture, including art galleries and sporting and cultural festivals. These efforts, such as supporting the Kaien Trailblazer Run (Port of Prince Rupert) and various tourism organizations, are designed to promote waterfront activation and maintain a vibrant atmosphere for residents and visitors.

Beyond financial aid, the port community provides significant human capital to local causes. Port employees contributed thousands of hours of service, highlighted by thousands of volunteer hours to various community initiatives, over $900,000 in support of local community events, annual grants and local charities. Initiatives are far reaching into the communities in which port operations take place supporting organizations and initiatives focused on food security, employment readiness, safety and shelter, environment as well as gender equity. This direct engagement supports various municipal initiatives and industry-specific events like Port Day that occur annually.

3.4 Environmental Stewardship and Sustainability

West Coast Ports terminal operators have made strong investments focused on energy efficiency and advancing electrification of port operations

A core priority across organizations is the protection of the regions in which they operate, by actively investing in sustainability initiatives, environmental stewardship, ecology, and marine-related programming to ensure the long-term health of the waterfront. BC's terminal operators have demonstrated strong support and commitment to continuous improvement by initiating projects that focus on increasing energy efficiency, advancing electrification of port operations to reduce emissions by adopting low-emission fuels and technology advancements. For example, DP World is

[14] https://npa.ca/wp-content/uploads/2020/12/Nanaimo-Port-Authority-Snuneymuxw-First-Nation-Relationship-Agreement-Announcement-Dec-23-2020.pdf

transitioning to electric powered cranes as well as piloting the use of hydrogen RTG. Other notable projects include Bunge's pilot program of 100% renewable diesel-powered locomotives, as well as GCT's participation in the Federal Net Zero challenge resulting in light duty electrification. Projects that support environmental stewardship include Neptune Terminals BC Bull Kelp Restoration Project with UBC, as well as broad support on projects that preserve marine habitats.

The Vancouver Fraser Port Authority has several initiatives focused on air quality and climate change, species at risk, and marine ecosystems which include:

- Green Marine Certification for organizations that meet or exceed standardized environmental best practices. The Vancouver Fraser Port Authority scores an average level of 4.6 out of 5 across eight different performance indicators.
- The ECHO (Enhancing Cetacean Habitat and Observation) Program is a collaborative, award-winning initiative launched in 2014 to better understand and reduce the impacts of marine shipping on whales, particularly endangered Southern Resident Killer Whales, through measures such as voluntary vessel slowdowns, underwater noise reduction, scientific research, monitoring, and mariner education. In 2025, more than 5,300 vessels participated in voluntary measures by slowing down or altering their route to avoid key areas of Southern Resident Killer Whale critical habitat. Over 80 marine transportation organizations participated in these initiatives.
- The Vancouver Fraser Port Authority advanced the first shore power project in Canada in 2009. With support from Transport Canada, the port authority is expanding its shore power from three connections to five connections, which will result in a 33 percent increase in the number of cruise vessels connecting to shore power at Canada Place and an estimated annual reduction of 3,400 tonnes of greenhouse gas (GHG) and 70 tonnes of criteria air contaminant (CAC) emissions once completed in 2027.
- In November 2024, North Vancouver's Seaspan Energy received the first-to-be-issued LNG bunkering accreditation from the port authority, helping the international shipping sector to move away from traditional marine heavy fuels.
- The EcoAction Program provides shipping lines, cruise operators, and marine service providers an up to 75% discount on harbour dues for actions that lower greenhouse gas emissions, air pollutants, and underwater noise, helping advance more sustainable trade through the Port of Vancouver.
- The Blue Circle Awards recognizes the environmental leadership of terminals, tenants, marine operators, and cruise and shipping lines at the Port of Vancouver. In 2025:
    - 12 terminals and tenants were recognized for conserving energy and reducing greenhouse gas emissions.
    - 10 cruise and shipping lines and five coastal marine operators were recognized for measures to reduce emissions and underwater noise.
    - Two organizations received a Special Mention for demonstrating early adoption of innovative technologies.

- The Habitat Enhancement Program (HEP) focuses on ensuring habitats benefit fish and wildlife throughout the Vancouver region, while balancing future developments of Port of Vancouver operations. Since 2012, the HEP has constructed and administered 13 habitat bank sites totaling approximately 10 hectares of offsetting habitat.

At the Prince Rupert Port Authority Sustainable growth remains a core value of the Prince Rupert Port Authority's operations. PRPA took on numerous projects focused on reducing harmful environmental impacts in 2025:[15]

- PRPA was Green Marine certified.
- In partnership with Innovate BC, four heavy-duty low and zero emissions vehicles were employed as part of a pilot project for Gat Leedm.
- PRPA also continued efforts to invest in renewable diesel. Launched in 2024, the Port's Renewable Diesel Initiative replaced over two million litres of conventional diesel with a lower-carbon alternative.
- PRPA's Environmental Sustainability team organized a shoreline cleanup which cleared 2km of beach at Seal Cove and the Atlin waterfront. Altogether, 70 volunteers representing 13 organizations collected 617 pounds of garbage along the shoreline.
- As part of a habitat compensation project, PRPA saw the installation of 30 tide pool blocks at the Material Offloading Facility in April 2025. This initiative supports the health of local marine ecosystems by facilitating algae growth critical to the life cycle of crabs, barnacles, and other life.

The Nanaimo Port Authority is committed to environmental protection, and the authority is an official participant of the Green Marine Environmental program.

The West Coast Ports provide significant value to their communities that extend well beyond the economic perspectives through their central role in Canada's supply chain supporting the movement of cargoes and people to, from and through Canada.

[15] https://2025.rupertport.com/#sustainability

Appendix: Study Methodology

Economic Impact Overview

Economic impact is a measure of the employment, spending, and economic activity associated with a sector of the economy, a specific project, or a change in government policy or regulation.

The different companies that operate within the marine port ecosystem contribute directly to employment in British Columbia, as well as the province's Gross Domestic Product (GDP). Port operations also act as an economic catalyst, facilitating the growth of regional businesses and industrial sectors.

Economic impact is a measure of the employment, spending, and economic activity associated with a sector of the economy, a specific project (such as the construction of new infrastructure), or a change in government policy or regulation. In this case, what is assessed is the economic impact of the operations of West Coast Ports in 2025.

Economic impact is commonly measured in several ways, including employment (jobs), wages, GDP, and economic output, as summarized in **Figure A-1**. West Coast Ports operations help to support the local, provincial and national economies and the importance of the industry is highlighted by both the employment/wage impacts and the impacts on the greater economy.

Categories of Economic Impact

The three major components of economic impact are *direct, indirect, and induced impacts*. These distinctions are used as a base for the estimation of the total economic impact of incremental operations and traffic associated with the operations of Canada's West Coast Ports at Vancouver, Prince Rupert and Nanaimo.

These categories of impacts are described below and summarized in **Figure A-2**.

Direct impacts Direct impacts account for the economic activity of the target sector itself. It is the employment, wages, GDP, and economic output that can be attributed to the operation and management of port activities. This includes activities by terminal operators, longshore workers, tugs, pilotage, the port authority, freight forwarders, rail, trucking, and warehousing, among others.

Indirect impacts Indirect impacts are those that result because of the direct impacts. It is the employment, wages, GDP, and economic output generated by downstream industries that support the port businesses. Indirect impacts are generated in industries that supply or provide services to the marine transport industry. For example, these could include oil refining activities for fuel, companies providing accounting and legal services to terminal operators, etc.

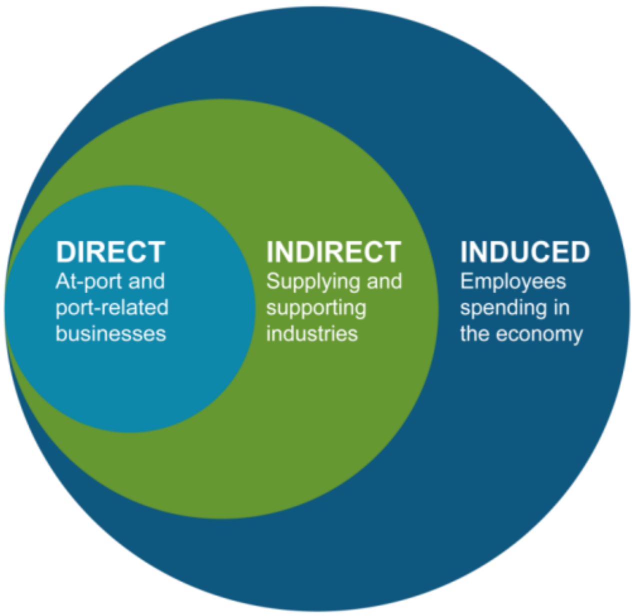
Induced impacts are economic impacts created by the spending of wages, salaries, and profits earned from direct and indirect economic activities. It captures the economic activity generated by the employees of firms directly or indirectly connected to the West Coast Ports spending their wages in the general economy. For example, a tugboat worker might spend his/her wages on groceries, restaurants, childcare, dental services, home renovations, and other items which, in turn, generate employment in a wide range of sectors throughout the general economy.

Total economic impacts as the sum of the direct, indirect, and induced impacts.

Figure A-1: Measurements of Economic Impact

Employment Jobs	The number of jobs or employees engaged at a firm or organization linked to the operations of the port.
Labour Income	All earnings (wages, salaries, and benefits) associated with employment tied to the port.
Gross Domestic Product GDP	A measure of the dollar value of final goods and services produced as a result of the economic activity associated with the port. This measure is net of the value of intermediate goods/services used as inputs to produce the final goods/services.
Economic Output Output	The dollar value of industrial output produced. Sometimes referred to as “economic activity,” it reflects the spending (e.g., capital improvement plus revenue) by firms, organizations, and individuals tied to the port. In the case of organizations that do not generate revenue (e.g., government-provided customs processing), annual operating expenses are counted.

Figure A-2:
Categories of Economic Impact Generated by Canada's West Coast Ports



Methodology

Direct Employment Estimate

The economic impact analysis is based on a review of the most current economic impact studies completed for the three ports, based on 2025 operations.

The studies for the Port of Prince Rupert and Port of Nanaimo are completed for 2025, whereas the study for the Port of Vancouver was based on 2021 cargo operations and 2023 cruise operations. The Port of Vancouver analysis was brought forward to 2025 based on container, commodity and cruise passenger throughput for relevant job categories such as terminal operations, trucking, rail and cruise operations that are reflective of 2025.

Additionally, BCMEA provided 2025 longshore employment (jobs) for all BC and the jobs associated with the Vancouver gateway, which was used to update the Port of Vancouver analysis. A productivity adjustment has also been applied to the 2025 analysis to account for changes that may have occurred since 2021, as well as a review of potential double-counting of jobs that may have occurred across the different studies.

Estimating Indirect and Induced Impacts

The indirect and induced impacts were estimated using economic multipliers and ratios, as is common practice for economic impact studies. In addition, the direct wage, GDP, and economic output impacts were also estimated using economic multipliers.

These multipliers were based on the Input-Output model of the Canadian economy maintained by Statistics Canada. An Input-Output (I-O) model is a representation of the flows of economic activity within a region or country. The model captures what each business or sector must purchase from every other sector to produce one dollar's worth of goods or services. Using such a model, flows of economic activity associated with any change in spending may be traced either forwards (spending generating income which induces further spending) or backwards (purchases of meals leads restaurants to purchase additional inputs, such as groceries, utilities, etc.). By tracing these linkages between sectors, I-O models can estimate indirect and induced impacts. These indirect and induced impacts are represented by economic multipliers, normally expressed as a ratio of total impacts (i.e., direct plus indirect plus induced) to direct impacts. Using the I-O model, multipliers can be produced for employment, income, GDP, and economic output, normally expressed in terms of a unit of direct impact (e.g., per dollar of direct economic output).

The ratios and multipliers used in this study were based on the 2022 Input-Output multipliers maintained by Statistics Canada for each of the provinces and Canada nationwide. These were the most current I-O multipliers available at the time of the study. The economic ratios and multipliers have been updated to reflect current price levels (i.e., 2025 dollars to correspond to the study year), but no structural changes have been assumed. Different multipliers are available for different industries. In this case, multipliers relating to shipbuilding and repair, capital investment, and non-maritime activities were used.

Multiplier impacts must be interpreted with caution since they may be illusory when the economy experiences high employment and output near industry capacity. When they are reported, it is recommended that the reader should be aware of the limitations on the use of multipliers. Mindful of these limitations, this study has undertaken multiplier analysis to estimate indirect and induced employment.

Great care must be exercised in choosing the appropriate set of multipliers to use. In addition, the use of multiplier analysis is limited by several factors, these being:

- the accuracy of the structure and parameters of the underlying model;
- the level of unemployment in the economy;
- the assumption of constant returns to scale in production;
- the assumption that the economy's structure is static over time; and
- the assumption that there are no displacement effects.

As with any model of a complex economy, I-O models have their limitations. For example, I-O models assume constant returns to scale (i.e., no economies or diseconomies of scale) and a fixed input structure with no substitution of inputs (e.g., one fuel type cannot be substituted for another). Furthermore, due to the large amount of data collection and analysis required, the I-O data can be released several years after the period on which they are based, so may not precisely represent current conditions. Nevertheless, I-O models are the most widely accepted and well-established means for estimating multiplier impacts and are based on data unparalleled in its detail and breadth.

2022 Statistics Canada Input-Output Multipliers

The multipliers used for the analysis are based on Statistics Canada economic multipliers for British Columbia and Canada from the 2022 Interprovincial Input-Output model, which is recommended by Statistics Canada as the most appropriate to capture impacts associated with current economic conditions. These multipliers were updated with Consumer Price Indices to account for inflation to 2025. Multiplier impacts are presented at the provincial level.

Capital Expenditure Impacts

Major capital improvement programs at marine ports can generate and sustain significant economic impacts. These impacts are treated separately from those associated with the normal or ordinary course of business, such as scheduled maintenance of port infrastructure. Investments and spending made over a multi-year period were reviewed to develop a more complete picture of the total impact of capital spending, especially since capital improvement programs typically occur over several years.

Tax Revenue Impacts

InterVISTAS used the direct employment estimates to calculate the estimated tax impacts (government revenue) generated by the port's operations. The tax revenue contributions to the federal, provincial, and municipal levels of government that are associated with port operations are estimated. This includes taxes paid by employers and employees (such as payroll taxes), and the port authority (such as payments-in-lieu of taxes). Estimated tax revenues are for calendar year 2025.

Social Impacts

Community contributions made by various marine port stakeholders are summarized and reported, quantification will be provided, where possible, including monetary donations, sponsorships, stakeholder engagement, community programs, etc. The West Coast Ports are critical community anchors whose contributions extend well beyond their economic role, generating meaningful social value through volunteerism, charitable giving, and local partnerships.

Note on Rounding and Dollar Figures

The findings of this study are presented throughout the report in rounded figures, as economic impact figures are estimates and not the result of a detailed audit or accounting exercise. All dollar figures throughout the report are expressed in 2025 dollars unless otherwise noted.

InterVISTAS

Prepared by

Inter*VISTAS* Consulting Inc.

450 Southwest Marine Drive
18th Floor
Vancouver, BC, V5X 0C3

Telephone: +1-604-717-1800
www.intervistas.com