

ACCESSING THE ASIA PACIFIC REGION, TRADE, AND TRANSPORTATION



**ACCESSING
THE ASIA PACIFIC
REGION, TRADE, AND
TRANSPORTATION**





CHINA

INDIA

Pakistan

Nepal

Bangladesh

SRI LANKA

Laos

Thailand

VIETNAM

Cambodia

Brunei

Malaysia

Singapore

INDONESIA

Timor-Leste

North Korea

South Korea

TAIWAN

Hong Kong

JAPAN

PHILIPPINES



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01

INTRODUCTION



THE FUTURE OF THE GLOBAL ECONOMY is in the Asia Pacific. The region is home to many of the world's fastest-growing economies and, by 2050, is forecast to account for 53 percent of the world's population and 52 percent of the world's gross domestic product (GDP). Canada's – especially Western Canada's – future economic well-being depends on its ability to continue expanding its trade and investment linkages with the region.

British Columbia, with its geographic proximity to the region and people-to-people linkages, has the natural advantages to fully seize the opportunity that the Asia Pacific presents. Moreover, it is in the ideal position to play the role of Canada's — and, more broadly, North America's — gateway to the region. As such, British Columbia has been a leader in building relationships with the Asia Pacific region, developing a robust trade infrastructure network, referred to as the **Western Trade Corridors**, that far exceeds that of any other Canadian province, and leveraging its historical and people-to-people connections.

The Corridors consist of key transportation infrastructure, such as the Port of Vancouver, the Port of Prince Rupert, the Vancouver International Airport (YVR), and three Class I railways that connect British Columbia all the way to the rest of Canada, the American East Coast, and Mexico, covering land, sky, and marine routes. The Corridors have laid an important foundation for Canada's future engagement with an increasingly more prosperous and dynamic Asia Pacific.

Canada's future success in Asia begins with British Columbia's transport infrastructure.

ASIA IN 2050

OVER THE NEXT 30 YEARS, the centre of the global economy will move toward Asia. By 2050, a majority of the world's population, GDP, and middle class will reside in the Asia Pacific. Western Canada's economic future depends in an important way on its ability to continue expanding its trade and investment linkages with the region. This continued engagement demands a deeper understanding of the growth trends in the region – particularly changes in demographics, consumption, and urbanization.

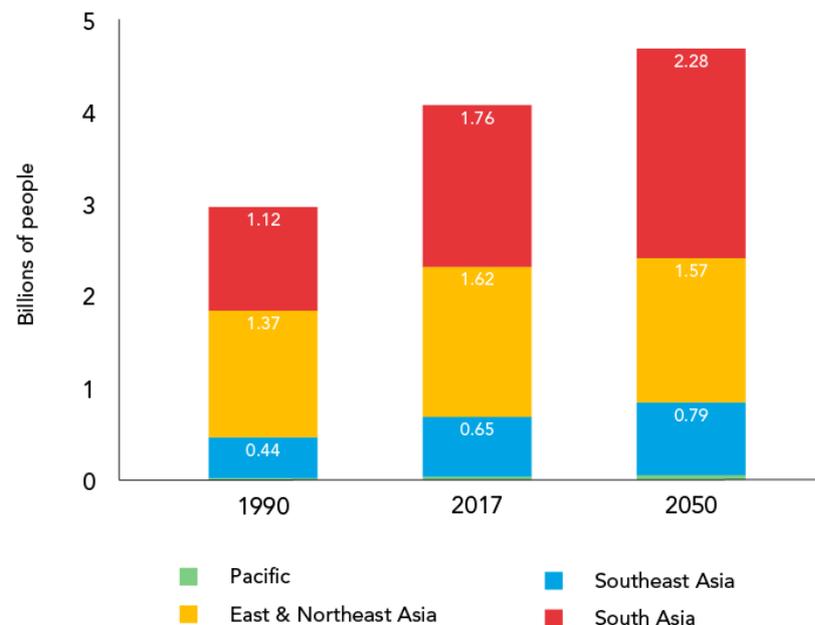
Demographics

Today, Asia is home to 4 billion people. By 2050, that number will reach 4.7 billion, which is equivalent to adding two times the current population of North America within the next 32 years. This continued population growth is accompanied by changing regional demographic trends, which will shift the centre of population growth in Asia southward.

Asia's Regional Population Distribution Is Shifting

The source of population growth is shifting southward in Asia. In 1990, 46 percent of the Asia Pacific's population was living in East Asia; by 2050, this sub-region will account for only 33 percent, with South and Southeast Asia accounting for more than half of the region's total population.

Population Size by Sub-region, 1990-2050



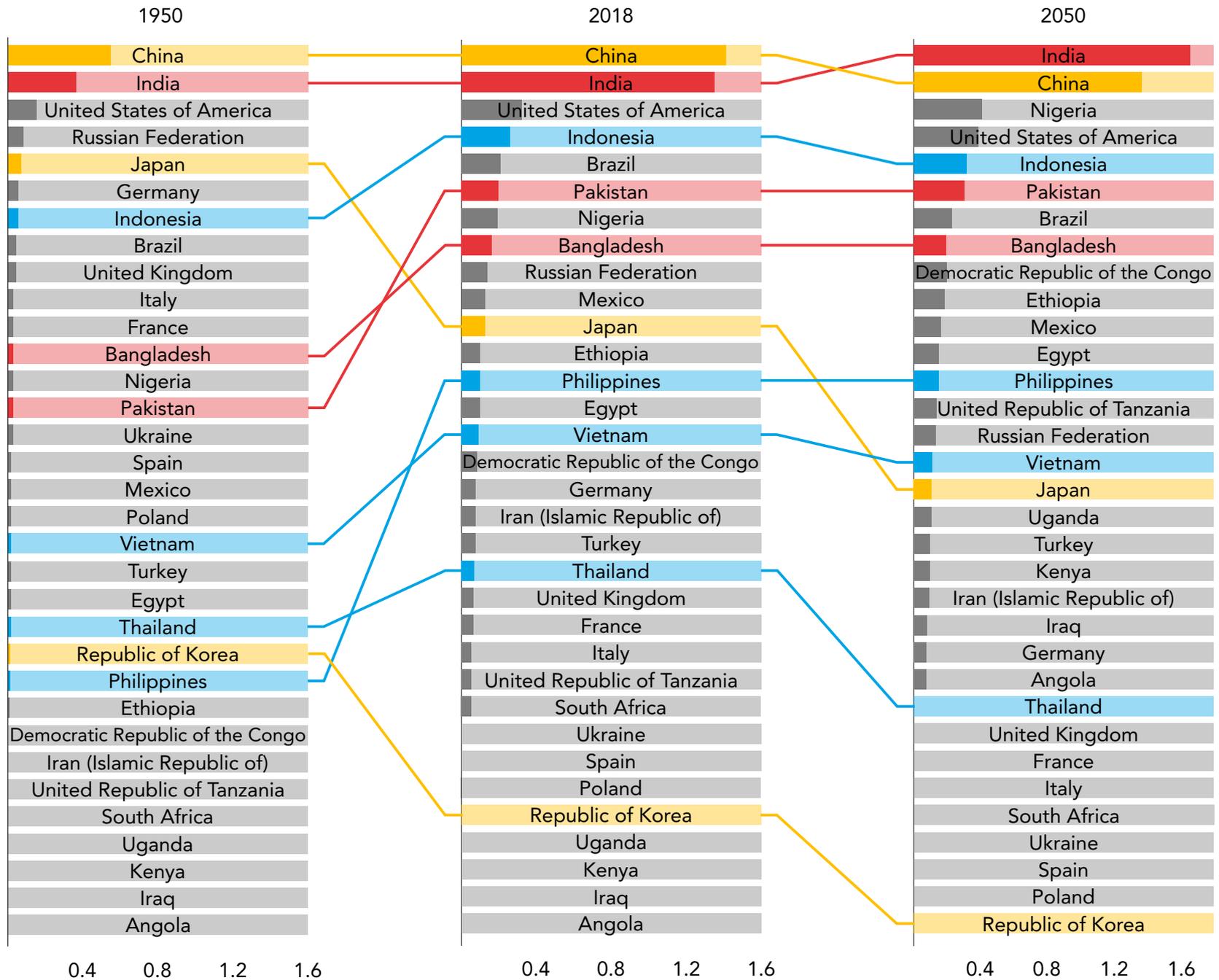
Source: UN Economic and Social Commission for Asia and the Pacific

As East Asia Gets Older, Youthful South Asia Enters the Workforce

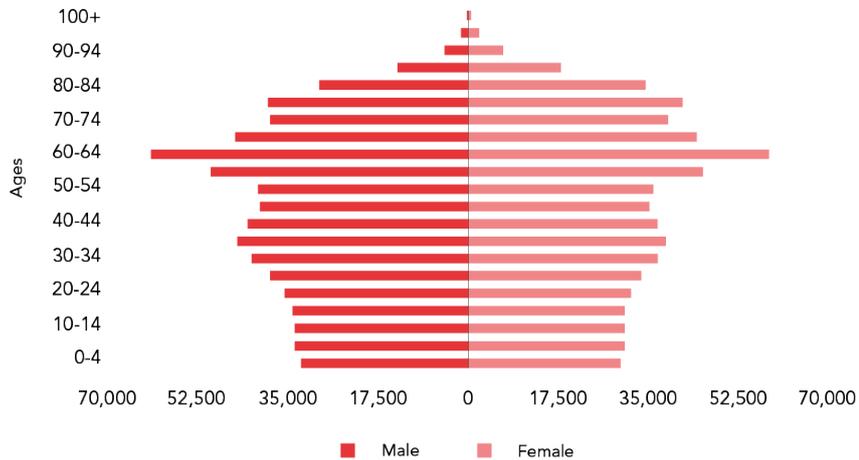
- Today, a robust working-age population (ages 15 to 64) is the main driver of economic growth in China. But by 2050, the working-age population in China will shrink by 20 percent (approximately 200 million people), resulting in a greater portion of the elderly population being supported by a shrinking workforce.
- On the other hand, India is currently experiencing growth in its youth population, with nearly half of the country's 1.3 billion people below the age of 25, and 64 percent under 35. By 2050, the working-age population will constitute 67.7 percent of India's population, with 1.1 billion out of 1.7 billion Indians in the workforce.
- The divergence in population trends between China and India reflects the greater regional change in the Asia Pacific. Approaching 2050, the majority of Asia's youth will be located in the south, while the proportion of elderly populations in East Asia will have expanded significantly.

Population by Country, 1950-2050

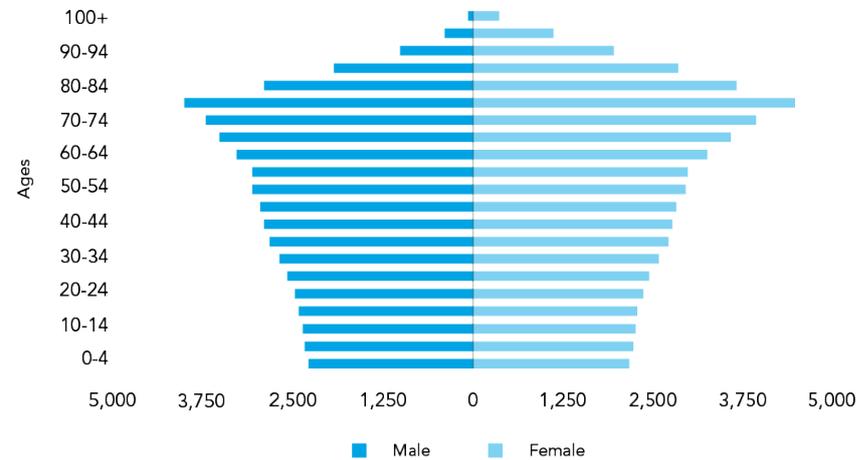
Billions of People



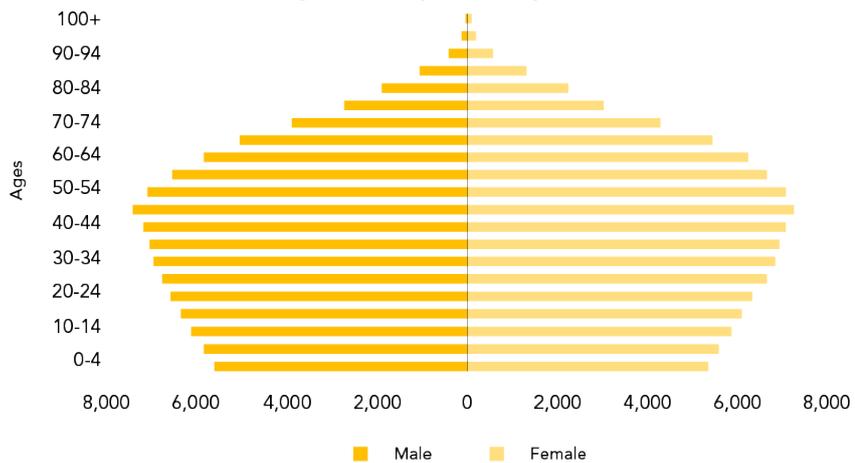
China Population Pyramid, 2050



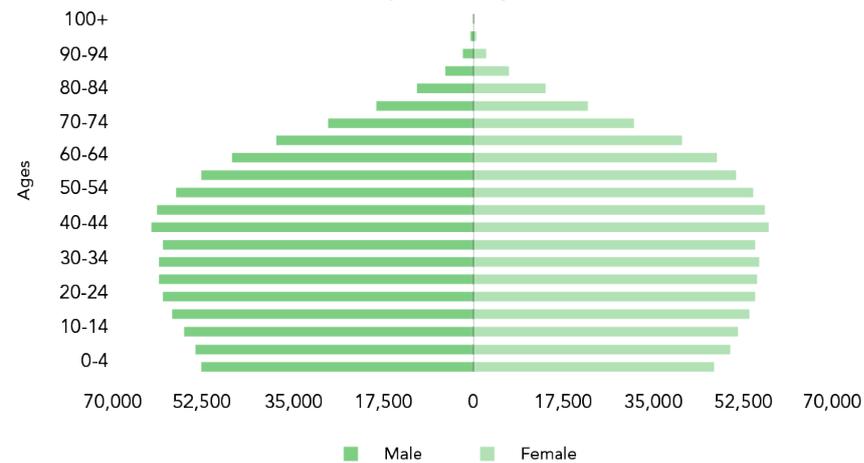
Japan Population Pyramid, 2050



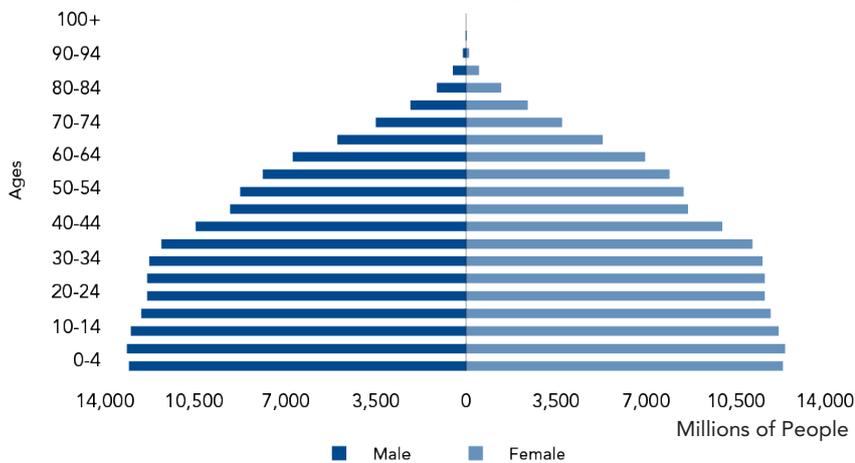
Bangladesh Population Pyramid, 2050



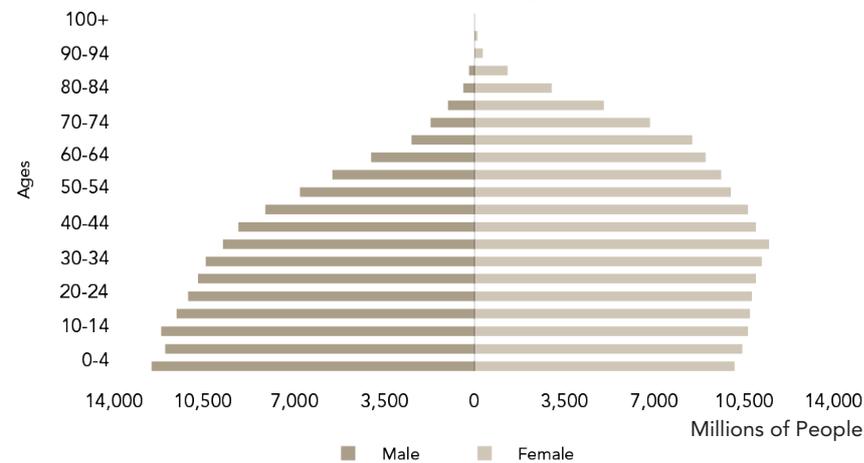
India Population Pyramid, 2050



Pakistan Population Pyramid, 2050



Indonesia Population Pyramid, 2050



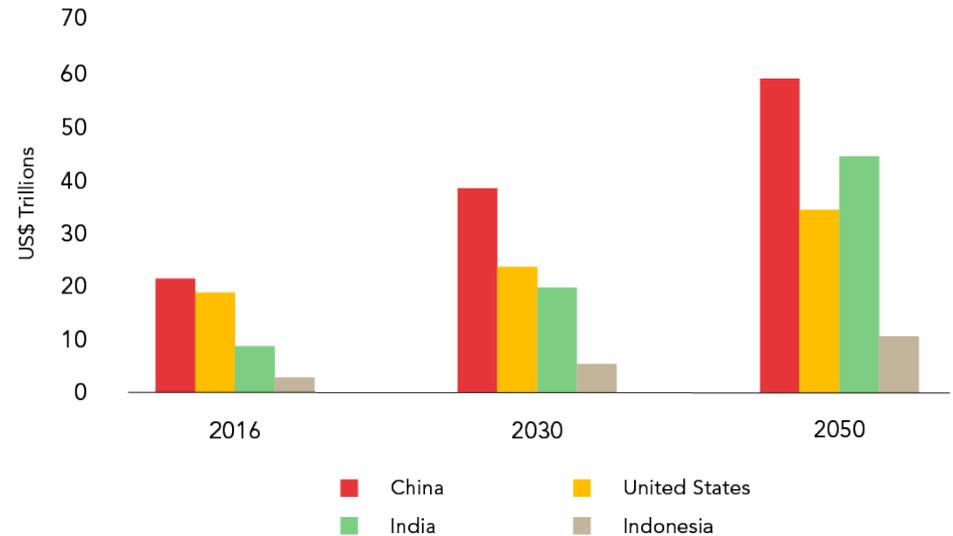
Economic Development

Asia in 2050 will not only be populous, but also prosperous, having pulled the centre of the global economy to the region. Numerous emerging economies with young workforces will be the principal drivers of this sustained growth. China and India will both surpass the United States to become the largest and second largest global economies in purchasing power parity terms, respectively, and Indonesia will surge to become the fourth largest economy by 2050.

Asia Will Lead the Global Economy

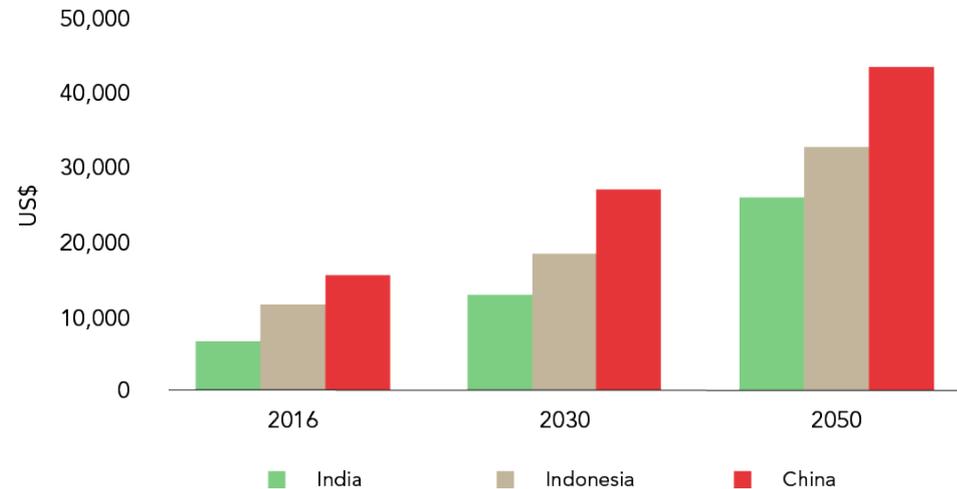
- By 2050, China will be the largest economy in the world with a GDP of US\$58.5T, while India will surpass the United States to become the second largest economy with a GDP of US\$44.1T.
- The GDP per capita in China, India, and Indonesia will jump by approximately 390 percent, 280 percent, and 280 percent, respectively, by 2050.
- The Association of Southeast Asian Nations (ASEAN), with a projected annual growth rate of over five percent a year, if taken as a single economic block, is forecast to become the fourth largest economy by 2050.

Projected GDP of Top Economies in 2050 (in PPP Terms)



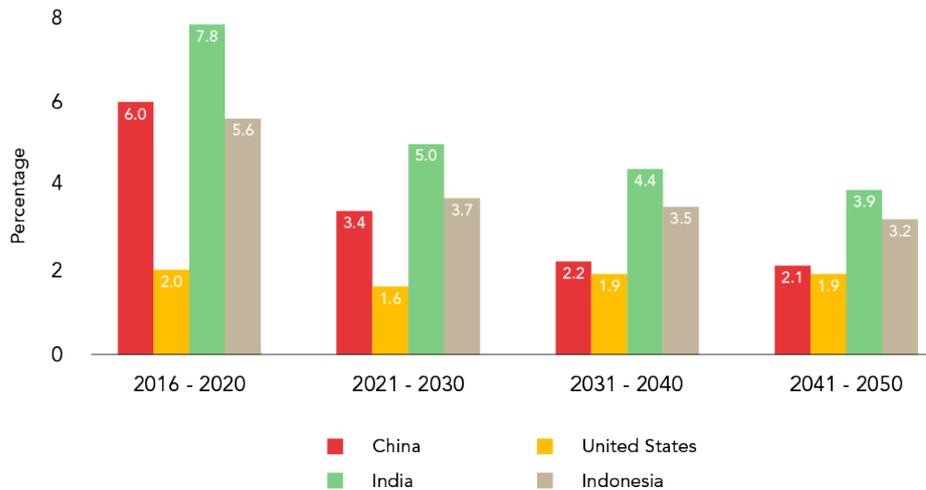
Source: PwC, The World in 2050

GDP per Capita Projections, 2016-2050



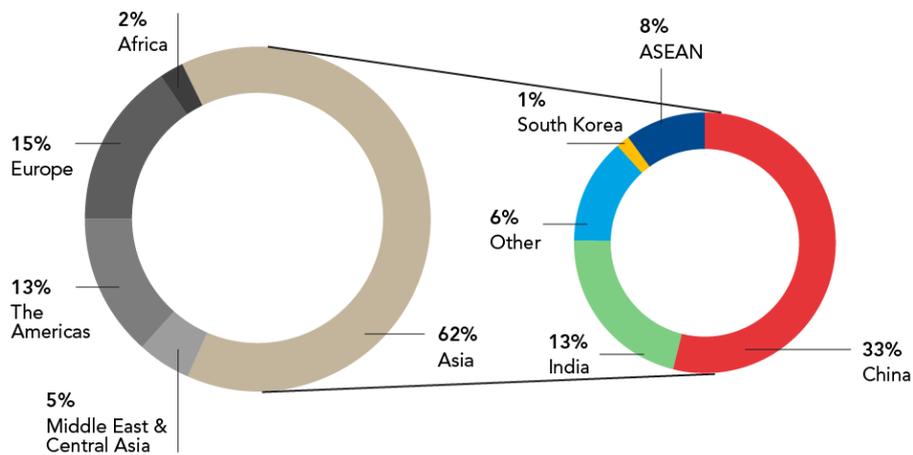
Source: PwC, The World in 2050

Projected Annual GDP Growth Rate



Source: IMF, Asia Pacific Regional Outlook, May 2018

Contribution to Global Growth by Region, 2017



*Numbers may not round to 100 percent due to rounding error.

Source: IMF, Asia Pacific Regional Economic Outlook, May 2018

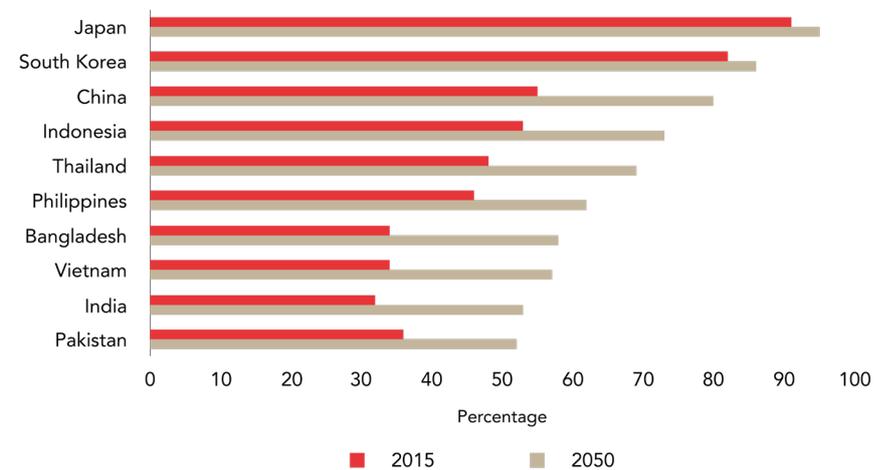
Urbanization

Following explosive population and economic growth, Asia will be home to 3.5 billion urban residents and 13 of the 25 largest cities in the world by 2050. Urbanization on such a major scale brings significant economic, environmental, and social implications for the region, but also the rest of the world.

The Majority of Asia's Population Will Be City Dwellers

- Today, 46 percent of people in Asia reside in urban centres. By 2050, 70 percent of people in Asia will reside in urban centres, constituting 3.5 billion of the world's 6.7 billion urban residents.
- Even though the overall national population in East Asia will begin a downward trajectory, internal migration will continue driving the growth of urban populations.

Most Urbanized Asian Countries in 2050 (Proportion of Urbanization)



Source: UN Department of Economic and Social Affairs, 2018

The Rise of South Asia's Megacities

- The most significant urbanization trend in the Asia Pacific is the growth of mega-cities in South Asia, which will create particular consumption and environmental patterns in the region.
- Asia is already home to some of the biggest urban centres in the world. Thirteen of the world's 25 largest cities in 2015 were in Asia, with six in East Asia, five in South Asia, and three in Southeast Asia.
- By 2050, with greater urbanization in South Asia, the size of its cities will increase. Mumbai, Delhi, and Dhaka will become the three largest cities in the world, and nine of the world's largest cities will be in South Asia and Southeast Asia.
- On the other hand, only three East Asian cities (Tokyo, Shanghai, and Beijing) will remain on the list of the 25 largest cities in 2050.

South Asia/Southeast Asia ■
East Asia ■

Most Populated Cities in the World, 2050

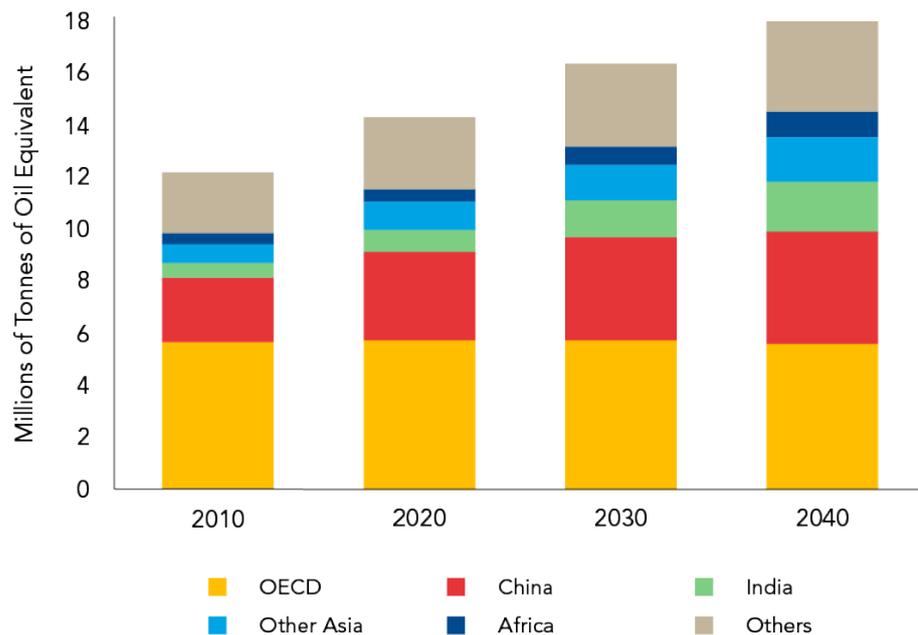
Rank 2050	Rank 2016	City, Country	Population in 2050
1	4	Mumbai (Bombay), India	42,403,631
2	2	Delhi, India	36,156,789
3	11	Dhaka, Bangladesh	35,193,184
4	23	Kinshasa, Democratic Republic of the Congo	35,000,361
5	14	Kolkata, India	33,042,208
6	17	Lagos, Nigeria	32,629,709
7	1	Tokyo, Japan	32,621,993
8	12	Karachi, Pakistan	31,696,042
9	10	New York City - Newark, USA	24,768,743
10	7	Mexico City, Mexico	24,328,738
11	9	Cairo, Egypt	24,034,957
12	18	Metro Manila, Phillippines	23,545,397
13	5	Sao Paulo, Brazil	22,824,800
14	3	Shanghai, China	21,316,752
15	-	Lahore, Pakistan	17,449,007
16	-	Kabul, Afghanistan	17,091,030
17	21	Los Angeles - Long Beach - Santa Ana, USA	16,416,436
18	30	Chennai, India	16,278,430
19	-	Khartoum, Sudan	15,995,255
20	-	Dar es Salaam, United Republic of Tanzania	15,973,084
21	6	Beijing, China	15,972,190
22	27	Jakarta, Indonesia	15,923,577
23	28	Bangalore, India	15,923,514
24	13	Buenos Aires, Argentina	15,462,230
25	-	Baghdad, Iraq	15,087,672

Source: UN Department of Economic and Social Affairs, The World's Cities in 2016; Hoonwig and Pop, population predictions for the world's largest cities in the 21st century

A Region of Big Spenders

Rapid economic and population growth, accompanied by increased urbanization, will also lead to major changes in consumption patterns. By 2030, Asia will be home to the world's largest group of consumers, representing 66 percent of the global middle-class population and 59 percent of middle-class consumption.¹ Asia's impact on consumption will have global implications, particularly for food security and energy consumption.

Demand for Primary Energy, Select Areas



Source: BP Energy Outlook, 2018

An Increasingly Voracious Region

- As economies develop and become more prosperous, people tend to substitute staple foods such as rice with more protein-rich and energy-dense foods. Raising even highly efficient forms of livestock, such as chicken, necessitates feed weighing as much as three times the weight of the meat it yields.
- From 2007 to 2050, the calories of food consumed in South Asia will rise by 17 percent. The dollar value of vegetables, fruits, and dairy products consumed in India is expected to increase by 114 percent, 115 percent, and 151 percent, respectively. The dollar value of meat consumption will increase by approximately 93 percent as well.
- During the same period, demand for meat products in ASEAN countries will increase by 128 percent.

More Energy to Fuel a More Energetic Asia Pacific

- According to BP's report, *Energy Outlook 2018*, all of the growth in energy consumption in the next 25 years will be in fast-growing developing economies, with half of the growth in global energy demand coming from China and India alone.
- The growth in energy-intensive sectors such as steel, cement, and manufacturing will shift from China toward India and other emerging Asia Pacific countries.
- Roughly 60 percent of global growth in electricity demand will come from the Asia Pacific. While reliance on coal will remain high through 2040, growth in demand for electricity will primarily be fulfilled by natural gas, nuclear, and renewable energy sources.² One notable exception is India, where the use of coal for electricity will more than double between now and 2040.

¹ Furthest available projection.

² Furthest available projection.

CANADA'S TRADE AND INVESTMENT AGREEMENTS WITH ASIA

IN A WORLD INCREASINGLY MARKED BY ISOLATIONISM, Canada stands out in its commitment to free trade and internationalism. As a signatory to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), Canada will become the only country in the world with multilateral free trade access to North America, Europe, and Asia. In addition, Canada has a free trade agreement (FTA) with South Korea and five bilateral investment treaties (BIT) in the region. This trade and investment network provides a valuable framework for Western Canada's continued engagement with the Asia Pacific.

Canada's Trade Agreements with Asia

	In-Force	Signed	Under Negotiation	Exploratory Discussions
FTAs	South Korea	Comprehensive and Progressive Trans-Pacific Partnership (CPTPP)	India Japan Pacific Alliance	China ASEAN
BITs	China Hong Kong Mongolia Philippines Thailand		India Pakistan	



Other Countries' In-Force Trade Agreements with Asia

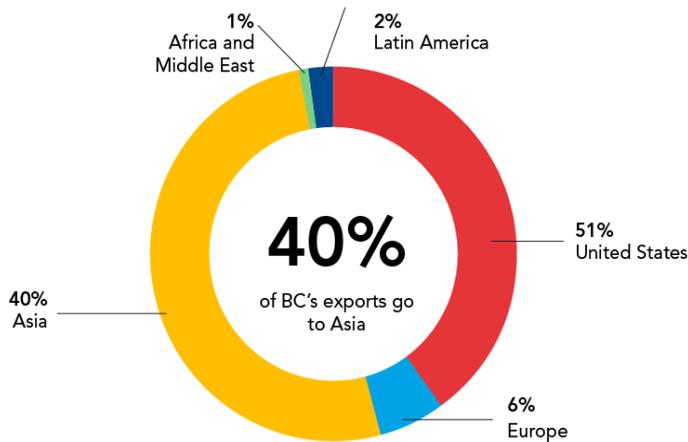
	Australia	Germany *	New Zealand	United Kingdom *	United States
FTAs	ASEAN	South Korea	Australia	South Korea	Australia
	China	Papua New Guinea & Fiji	ASEAN	Papua New Guinea & Fiji	South Korea
	Japan		Brunei		Singapore
	Malaysia		China		
	New Zealand		Hong Kong		
	Singapore		Malaysia		
	South Korea		Singapore		
	Thailand		Taiwan		
			Thailand		
			South Korea		
BITs	China	Brunei	China	Bangladesh	Bangladesh
	Hong Kong	Cambodia	Hong Kong	China	Mongolia
	Mongolia	China		Hong Kong	Sri Lanka
	Philippines	Guinea		India	
	Thailand	Hong Kong		Indonesia	
		South Korea		South Korea	
		Laos		Laos	
		Malaysia		Malaysia	
				Mongolia	
				Nepal	
				Pakistan	
				Papua New Guinea	
				Philippines	
				Singapore	
				Sri Lanka	
			Thailand		
			Vietnam		

* FTAs via EU agreement

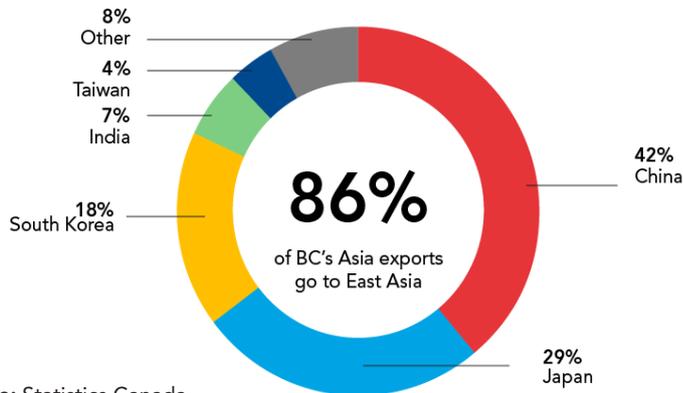
**BRITISH
COLUMBIA'S
ECONOMIC
RELATIONSHIP
WITH ASIA**

AS THE ASIA PACIFIC'S POINT OF ENTRY TO CANADA, British Columbia has been a leader in building relationships with the Asia Pacific region, developing a robust trade network that far exceeds that of any other Canadian province, and leveraging its historical and people-to-people connections. British Columbia's strategic investments in transportation infrastructure through the Western Trade Corridors continue to further enhance its natural geographical advantage, positioning it as the Americas' gateway to the Asia Pacific region.

Trade Destinations for BC Exports, 2017

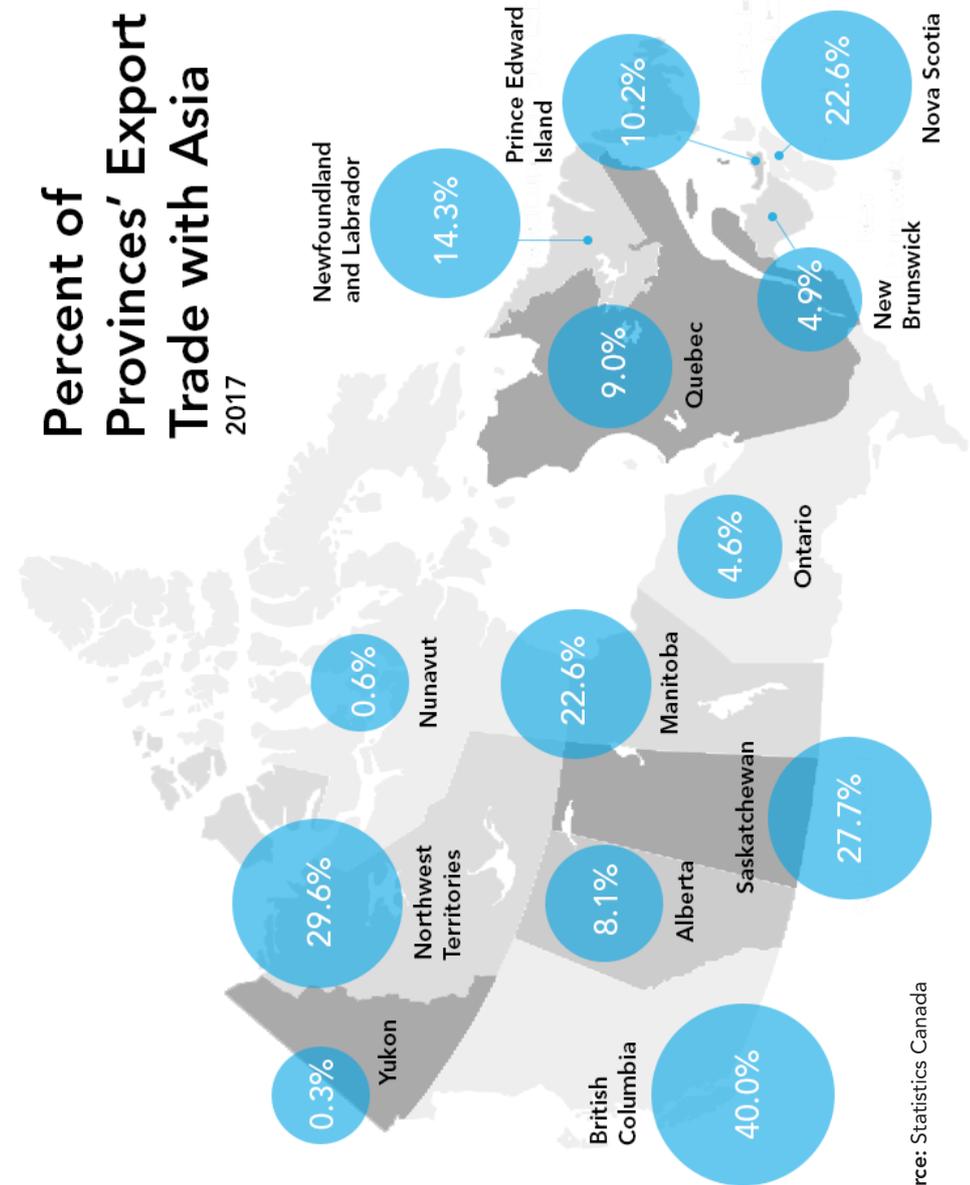


BC's Top 5 Asian Export Partners, 2017



Source: Statistics Canada

Percent of Provinces' Export Trade with Asia 2017



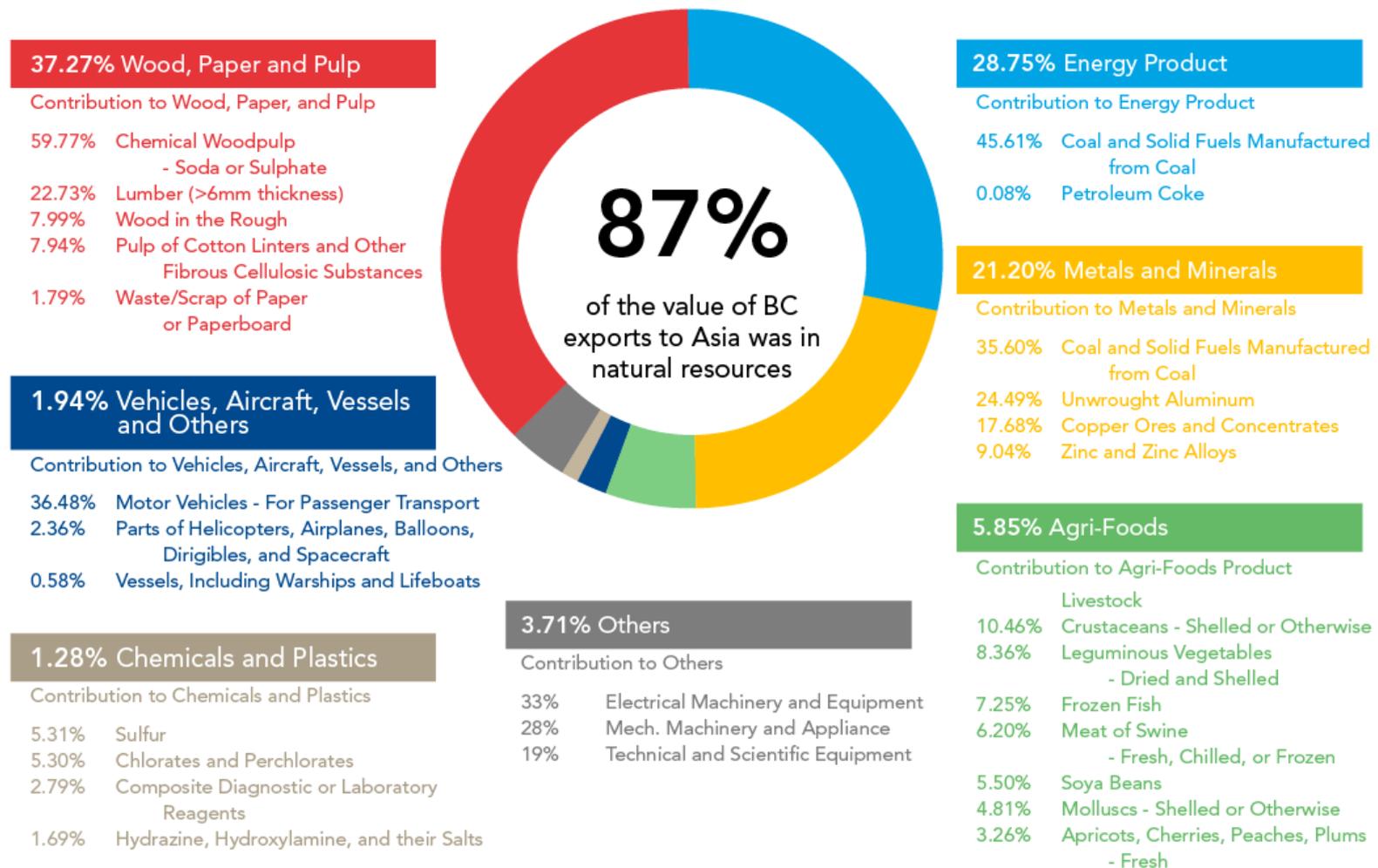
Source: Statistics Canada

British Columbia, Strengthening Exports to the Asia Pacific

- While the United States continues to receive the bulk of Canadian exports, Canada's export markets have diversified significantly. Exports to Asia have grown from 6 percent of total exports in 2000 to 11 percent in 2017.

- British Columbia has been leading this trend in Canada. In 2000, 25 percent of BC's exports went to Asia, and by 2017 this number had grown to 40 percent. China, Japan, South Korea, India, and Taiwan together accounted for C\$15.7B of BC exports in 2017.
- Almost 90 percent of the total value of BC exports to Asia consist of natural resources, including wood products (35.94 percent), energy products (28.75 percent), metals and minerals (21.20 percent), and agri-food products (5.85 percent).

BC Exports to Asia by Product Sectors, 2017

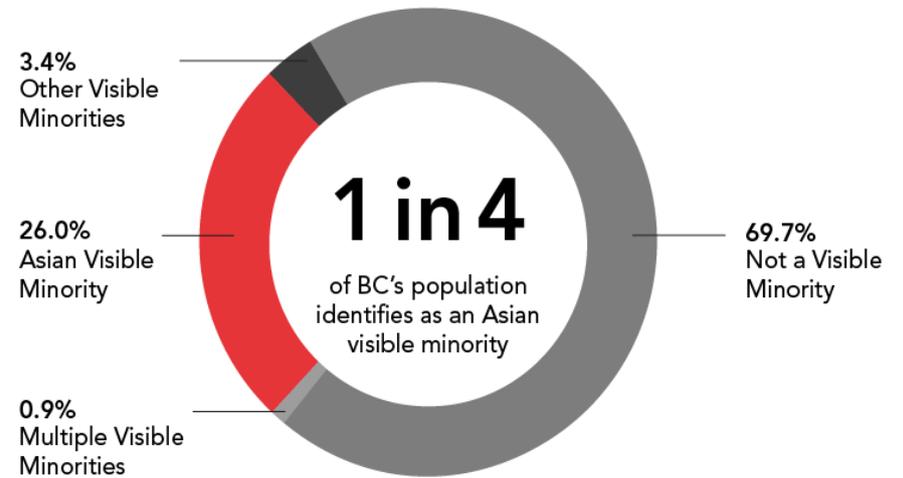


British Columbia's People-to-People Ties with Asia

- As the point of entry into Canada from the Asia Pacific, British Columbia has had long-standing people-to-people connections with Asia, especially with China and India.
- In 2016, 26 percent of the population of British Columbia (and 42 percent of Vancouver) consisted of Asian visible minorities.
- Economic immigrants from Asia constituted 69.7 percent of all new economic immigrants who came to British Columbia in 2016. Immigrants from the Philippines (33 percent) and India (25 percent) accounted for more than half of that number.
- British Columbia receives more Asian tourists than any other Canadian province, and Asia (at 22 percent) represented the second most important source of international tourists for British Columbia, after the United States (64 percent). The number of Asian tourists has been rising since 2010.
- British Columbia is also a favourite destination for Asian students. In 2016, 48,295 Asian students came to the province, representing 73 percent of all international students.

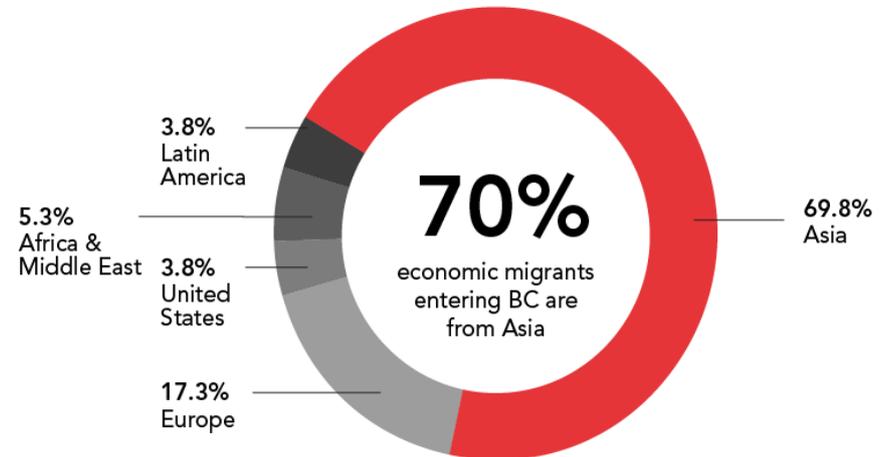


BC Population Breakdown, 2016



Source: Statistics Canada

Source Regions of Economic Migrants Entering BC in 2016



Source: Statistics Canada

Western Canada, Driving Economic Growth

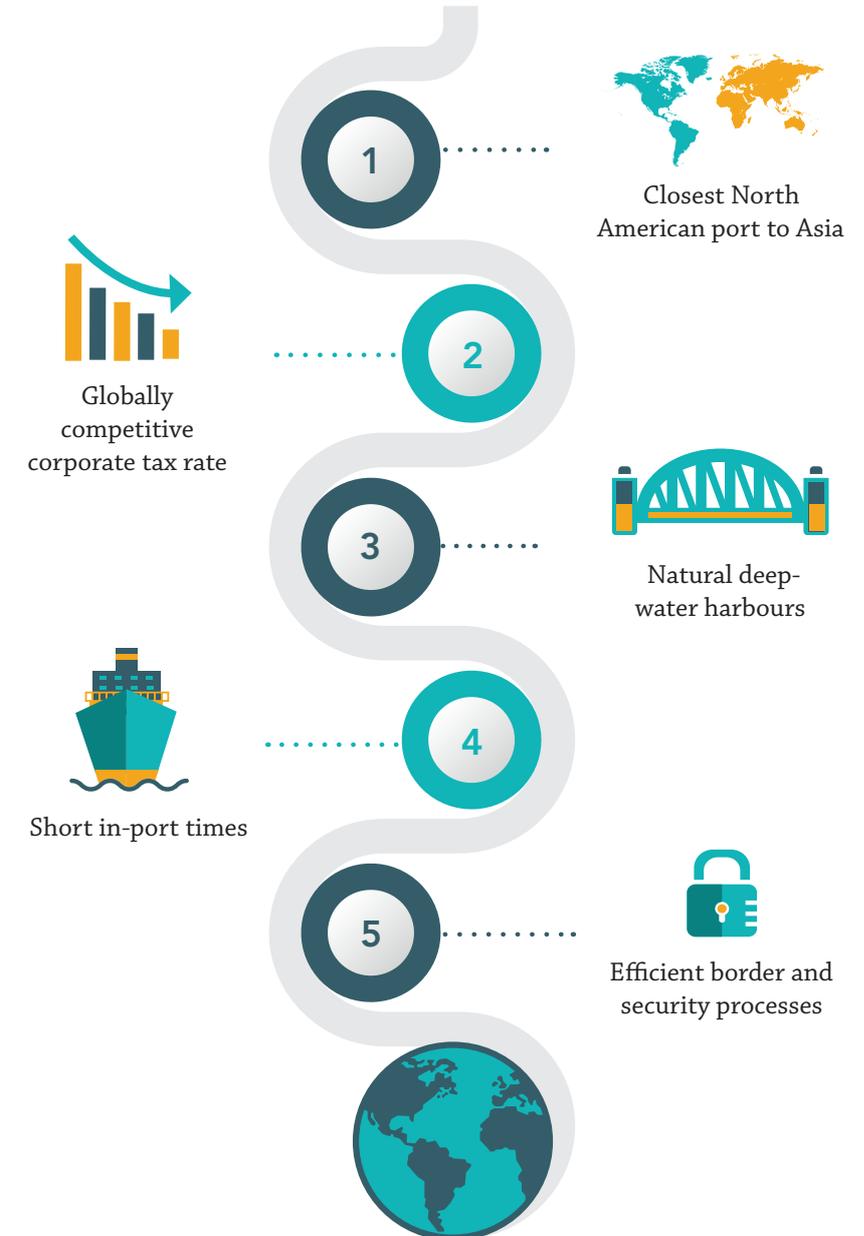
Western Canada is home to a diverse manufacturing sector and a large store of natural resources; the region as a whole contributes 37 percent of Canada's GDP. Further, the region's natural resources and forestry products will be in high demand by the Asia Pacific's growing middle class, which will make Canada's Western Trade Corridors one of the most important and dynamic trade networks in the lead-up to 2050.

- Western Canada has committed to strengthening its trade with the Asia Pacific, and in less than 10 years it has increased its trade flow with Asia by 20 percent.
- The region is one of the world's largest exporters of wheat and the largest exporter of canola.
- Western Canada is also home to high-demand resources, such as potash, uranium, steelmaking coal, petroleum, and natural gas.

The Western Trade Corridors

In an increasingly connected world, gateways help boost trade and investment and are key to a country's economic growth. For this purpose, the Western Trade Corridors, a large-scale transportation infrastructure network that weaves together key ports and roads and links the Asia Pacific region with Western Canada, have been developed. The Corridors build upon British Columbia's extensive transportation networks, which includes more than 46,000 kilometres of roads, three Class I railways, and 51 border crossings. Through such investments in strategic transportation infrastructure, Canada has effectively strengthened Western Canada's position as the gateway to the Asia Pacific.

Western Canada's Gateway to the World



The **Western Trade Corridors** provide world-class marine, rail, road, and air infrastructure. Combined with Canada's deep-rooted cultural, family, and business connections with Asia Pacific countries, this initiative gives Canada a unique advantage.

- Port of Prince Rupert
 - › The Northern Corridor through Prince Rupert is the closest bulk and container facility linking Asia and North America. With a channel depth of 35 metres and terminal berths of 17 metres, it is the second deepest natural harbour in the world and can handle the largest transpacific trade vessels.
 - › The Port of Prince Rupert is the fastest growing port in North America and has direct service to Chicago. Intermodal cargo shipped from Asia to North American destinations via Prince Rupert experience an advantage of up to 3 to 8 days faster, more reliable service than other west coast gateways.
- Port Metro Vancouver
 - › With 27 major marine cargo terminals, Super Post-Panamax capacity, extensive on-dock rail facilities, and a comprehensive range of services to support shippers, the Port of Metro Vancouver is Canada's largest port, the most diversified port in North America, and Canada's gateway to Asia.
 - › The port is connected to three inter-continental rail lines servicing North America's East Coast and Mexico. Additionally, trucks have direct access eastward via the Trans-Canada Highway and direct routes to the United States. The port has a projected volume to increase from 142 million tons in 2017 to 200 million by 2030.
- Vancouver International Airport (YVR)
 - › YVR is one of North America's fastest-growing airports, welcoming a record 24.2 million passengers in 2017 and offering non-stop flights to 110 destinations around the world.
 - › In 2018, YVR announced C\$9.1B in additional capital spending over the next 20 years to accommodate an anticipated 32 million passengers and 327,000 tonnes of cargo moving through the airport each year.

CANADA-ASIA COMMERCIAL NETWORKS

NETWORKING ORGANIZATIONS

In Canada:

- The Business Council of Canada
- Canada, Australia and New Zealand Business Association
- Canada China Business Council
- Canada China Chamber of Industry and Commerce
- Canada-India Business Council
- Canada Korea Business Council
- Canada Mongolia Chamber of Commerce
- Canada-Pakistan Business Council
- Canada Pakistan Chamber of Commerce
- Canada-Sri Lanka Business Council
- Canada-Vietnam Trade Council
- Canadian Chamber of Commerce
- Hong Kong-Canada Business Association
- Indo-Canada Chamber of Commerce
- Japan Society
- The Korean Canadian Chamber of Commerce
- Philippine Canada Trade Council
- Philippine Chamber of Commerce: Toronto
- Southeast Asia Canada Business Council

In Asia:

- APEC Business Advisory Council
- Canada-ASEAN Business Council
- Canada Bangladesh Chamber of Commerce and Industry
- Canadian Australian Chamber of Commerce
- Canadian Chamber of Commerce in Hong Kong
- Canadian Chamber of Commerce in Japan
- Canadian Chamber of Commerce in Korea
- Canadian Chamber of Commerce in Shanghai
- Canadian Chamber of Commerce in Singapore
- Canadian Chamber of Commerce in Vietnam
- Canadian Chamber of Commerce of Cambodia
- Canadian Chamber of Commerce of the Philippines
- Indonesia Canada Chamber of Commerce
- Malaysia Canada Business Council
- Pacific Economic Cooperation Council
- Thai-Canadian Chamber of Commerce



ABOUT THE ASIA PACIFIC FOUNDATION OF CANADA

THE ASIA PACIFIC FOUNDATION OF CANADA is dedicated to strengthening ties between Canada and Asia with a focus on expanding economic relations through trade, investment, and innovation; promoting Canada's expertise in offering solutions to Asia's climate change, energy, food security, and natural resource management challenges; building Asia skills and competencies among Canadians, including young Canadians; and, improving Canadians' general understanding of Asia and its growing global influence.

The Foundation is well known for its annual national opinion polls of Canadian attitudes regarding relations with Asia, including Asian foreign investment in Canada and Canada's trade with Asia. The Foundation places an emphasis on China, India, Japan, and South Korea while also developing expertise in emerging markets in the region, particularly economies within ASEAN.

Visit APF Canada at www.asiapacific.ca



ABOUT THE GATEWAY COUNCIL

THE GREATER VANCOUVER GATEWAY COUNCIL objectives are to improve competitiveness of the transportation of goods and persons through the Greater Vancouver multimodal gateway and to raise awareness among the Greater Vancouver area public and stakeholders of the contribution of the gateway to local, provincial, and national economies. The Council was formed in the mid 1990s with members representing the port, airport, Class I and regional rail companies, truck operators, marine terminals, labour, and TransLink. The Greater Vancouver Gateway Council was instrumental in defining and reaching consensus on priority transportation infrastructure needs that were subsequently constructed as part of the Asia Pacific Gateway Corridor Initiative in the early 2000s. More recently, the Council has participated in the Gateway Transportation Collaboration Forum with other partners and identified infrastructure projects required to meet capacity needs through 2030 while at the same time enhancing the liveability of the Metro Vancouver region. The Council adopts a collaborative, consensus-based approach and promotes engagement with federal and provincial governments, municipalities, and Indigenous communities.



ABOUT THE WESTERN TRANSPORTATION ADVISORY COUNCIL

Visit WESTAC at www.westac.com

FOR OVER FOUR DECADES, Western Transportation Advisory Council (WESTAC) has been Western Canada's premier transportation forum. It is the only non-partisan organization that unites business, labour, and government in discussions regarding the western transportation system that supports the movement of western and Canadian commodities and other goods. WESTAC's 50-plus member organizations span the modes and sectors of freight transportation: carriers and logistics providers, ports and terminals, shippers, labour unions, and the three levels of government. Among others, WESTAC's members include the largest railways, ports, and commodity shippers in the country that represent a significant share of the Western Canadian economy. WESTAC recognizes that the region's transportation system is of national significance, as a foundation of economic growth and national connectivity.



11 October 2018



ASIA PACIFIC
FOUNDATION
OF CANADA

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THE ASIA PACIFIC IN 2050

Trends and Opportunities for Canada

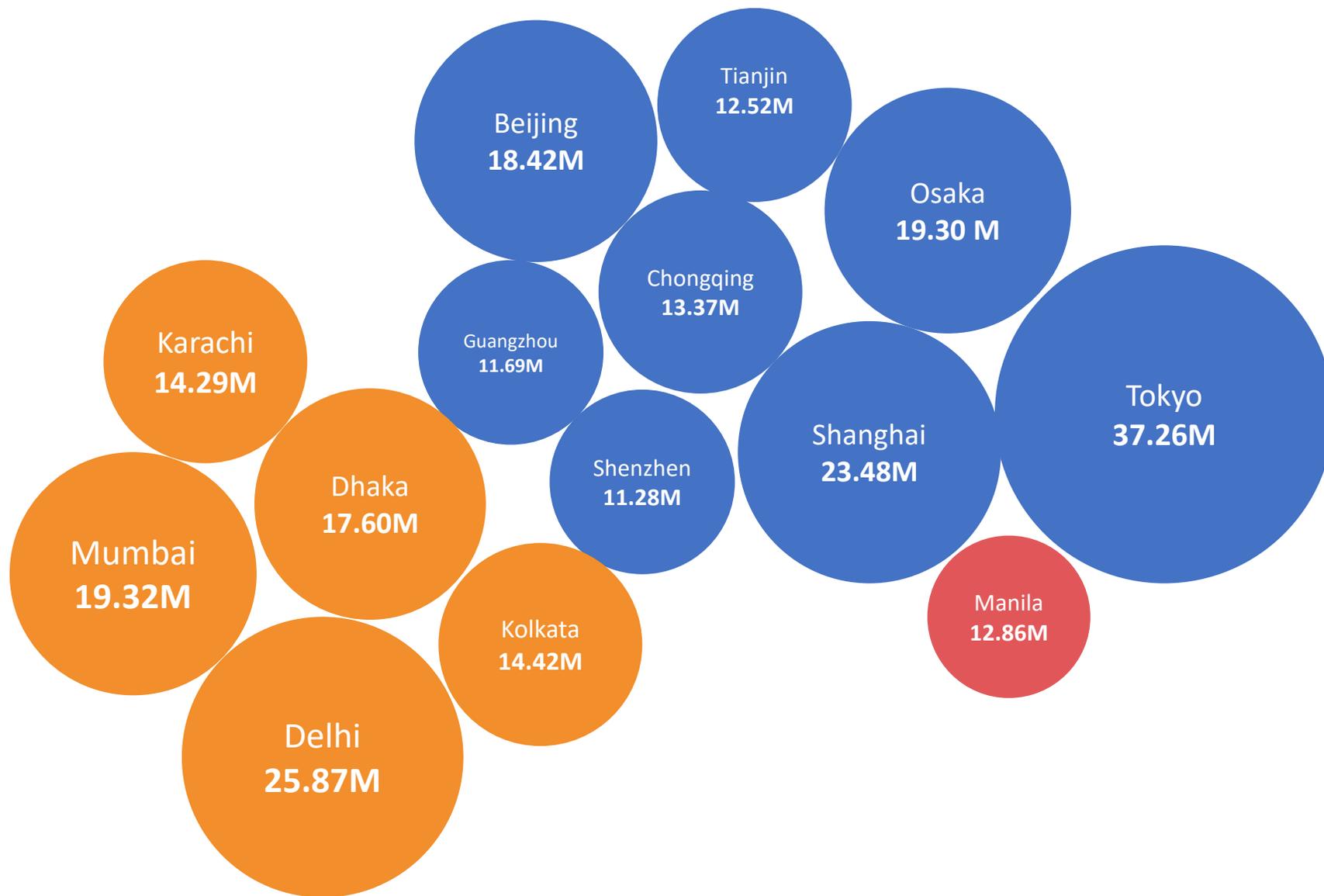
STEWART BECK
PRESIDENT AND CEO



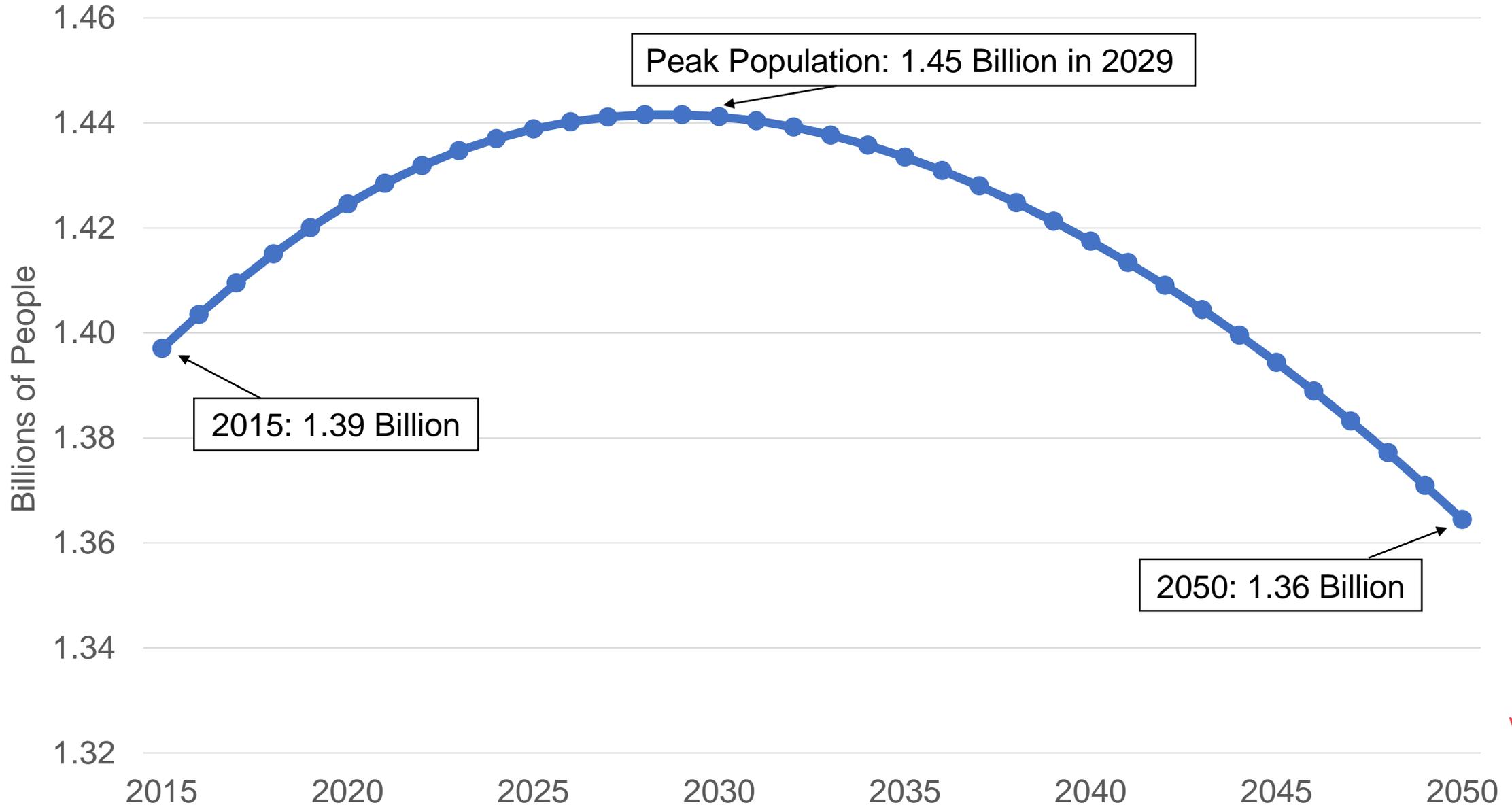
Demography

Largest Cities in Asia 2015

- East Asia
- South Asia
- Southeast Asia



China's Population, 2015-2030



Largest Cities in Asia 2050



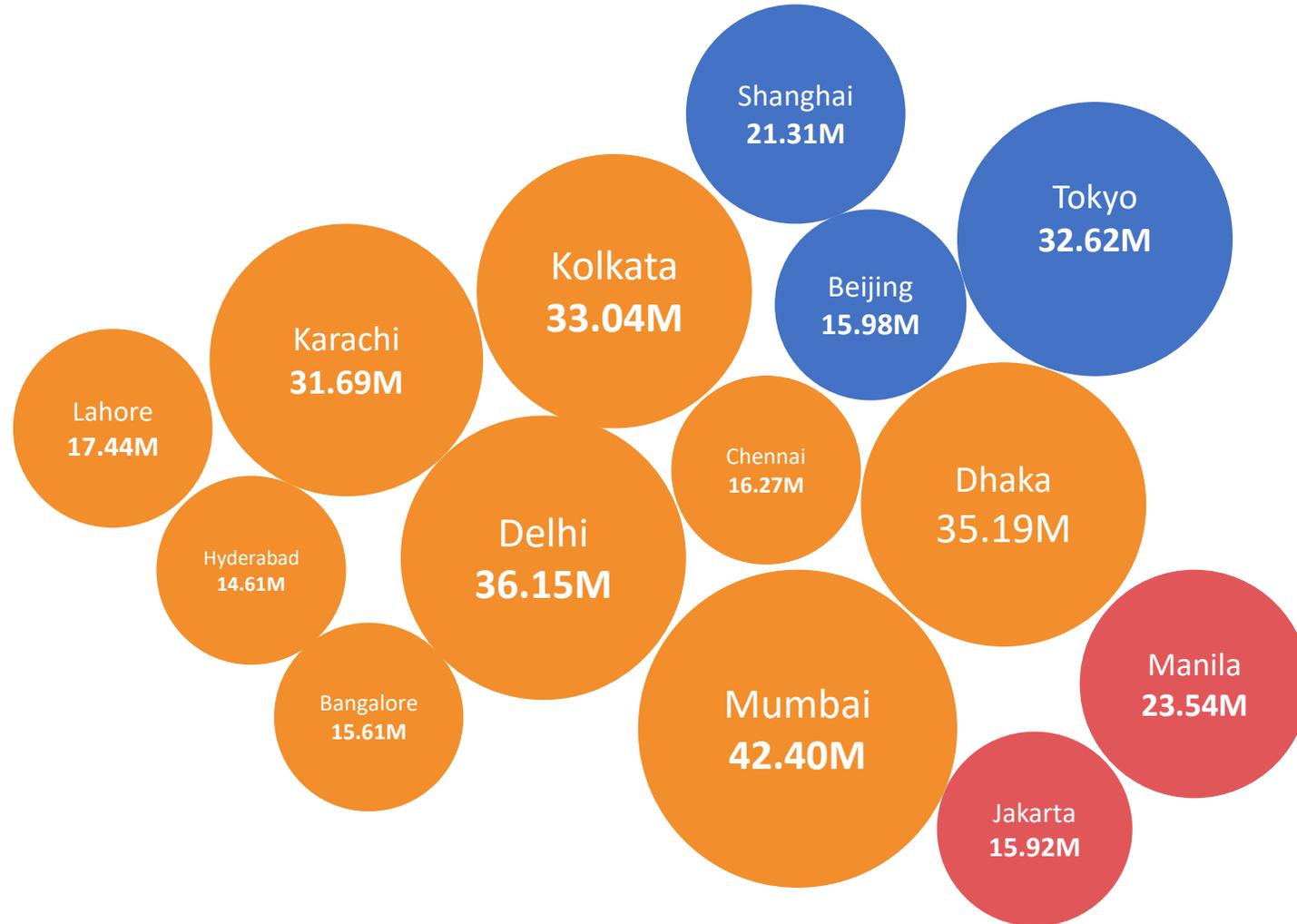
East Asia



South Asia

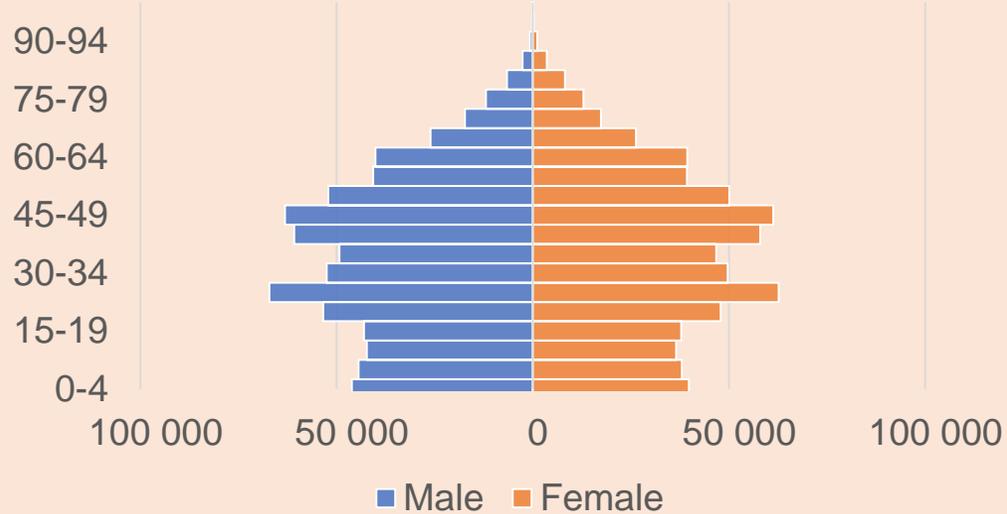


Southeast Asia

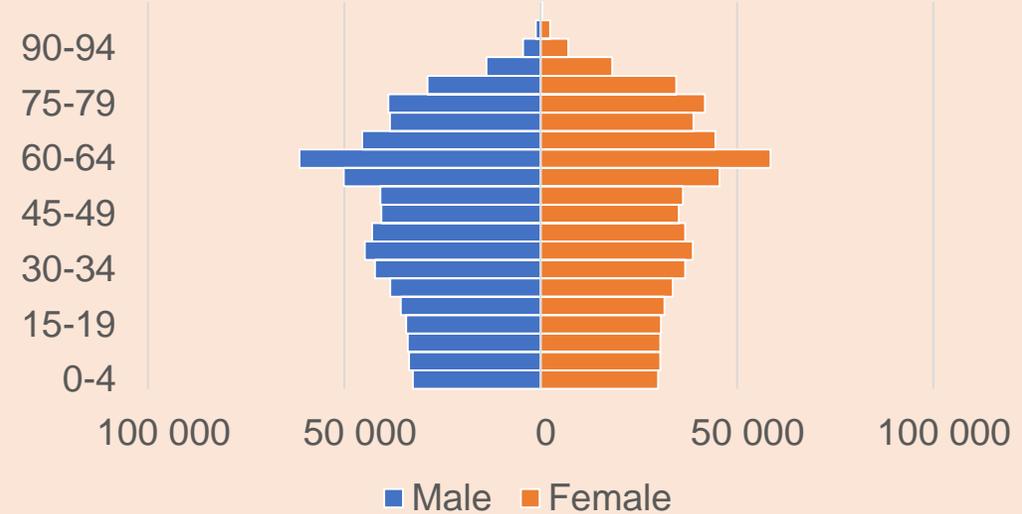


Population Pyramids for China and India, 2015 vs 2050

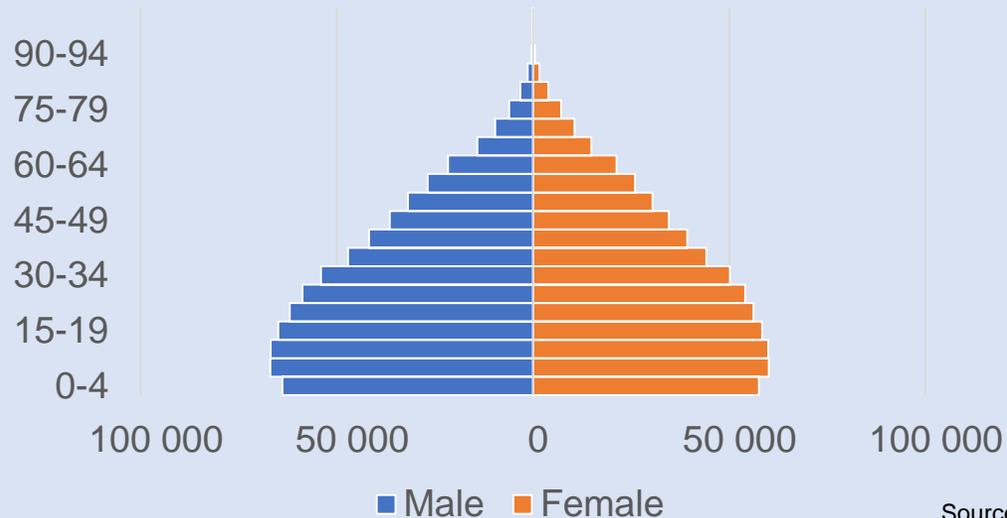
China, 2015



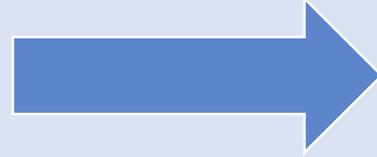
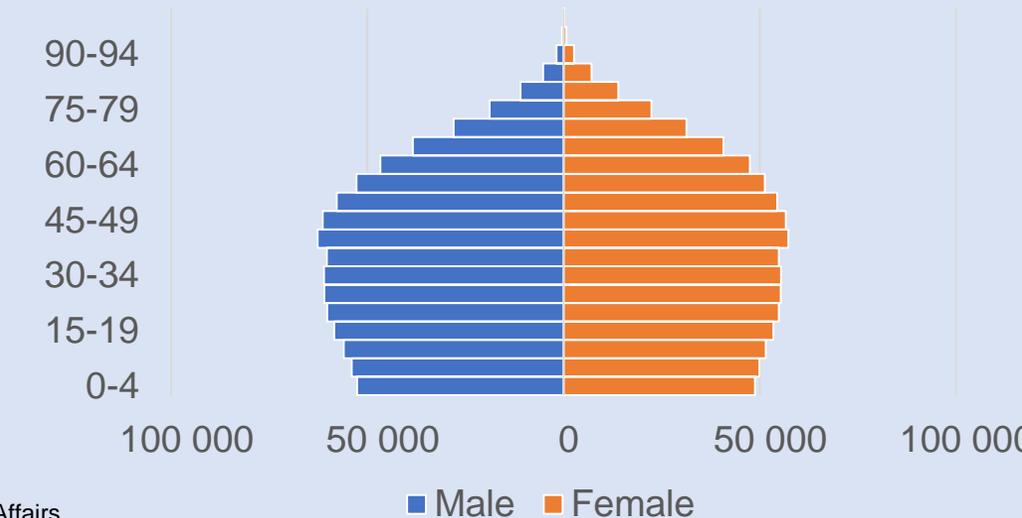
China, 2050



India, 2015



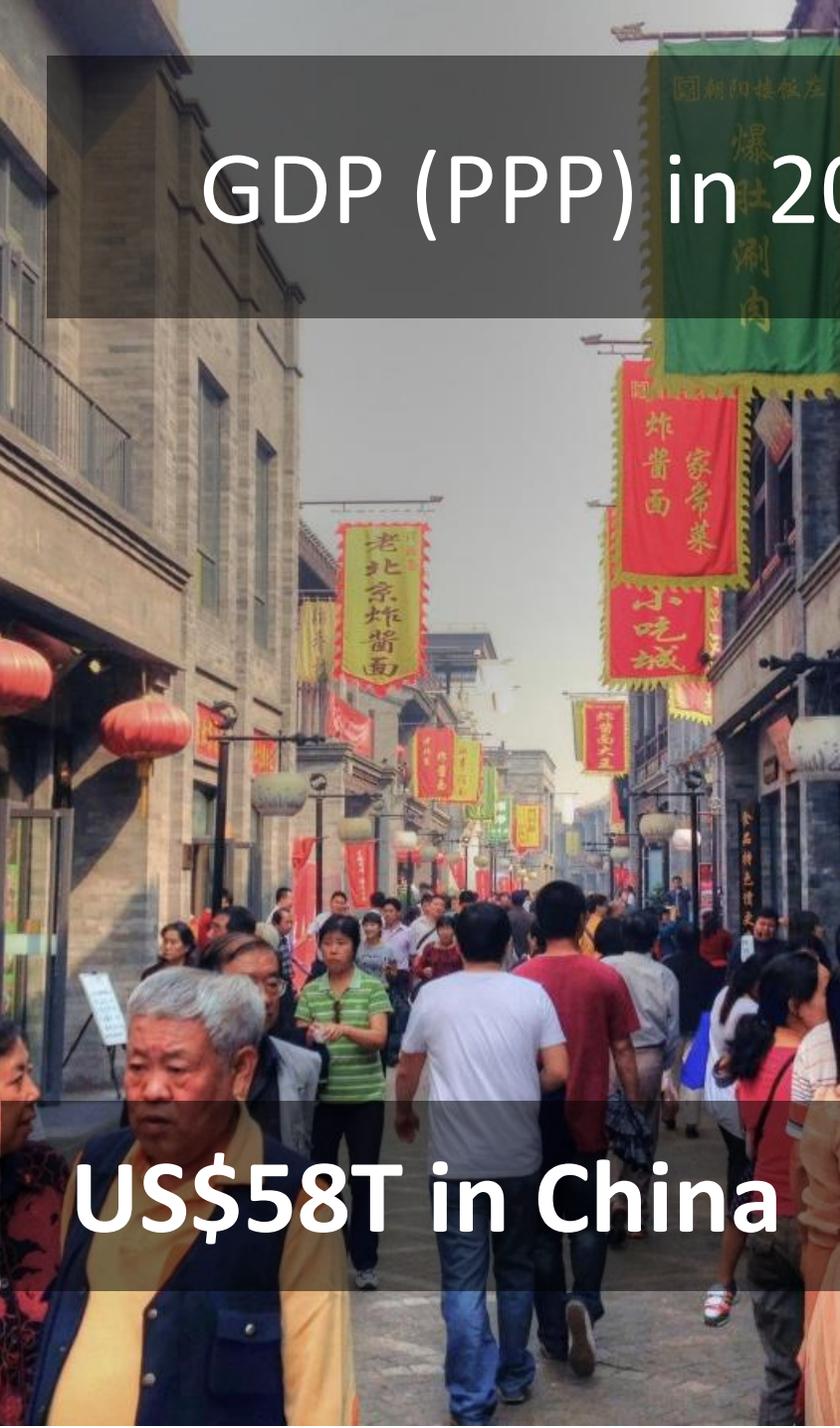
India, 2050





Economic Growth

GDP (PPP) in 2050



US\$58T in China

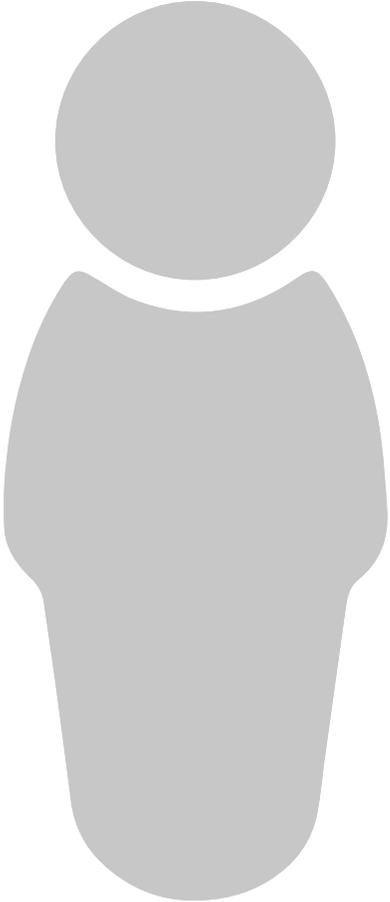


US\$44T in India



US\$34T in U.S.

India 2015

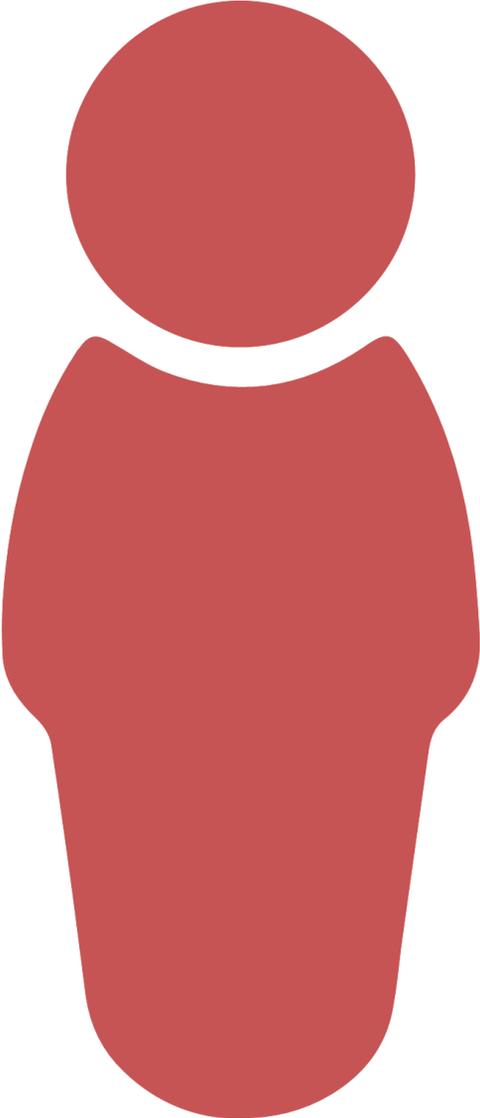


Pop. 1.30 Billion



GDP/Cap \$6,600

India 2050



Pop. 1.7 Billion



GDP/Cap \$25,900



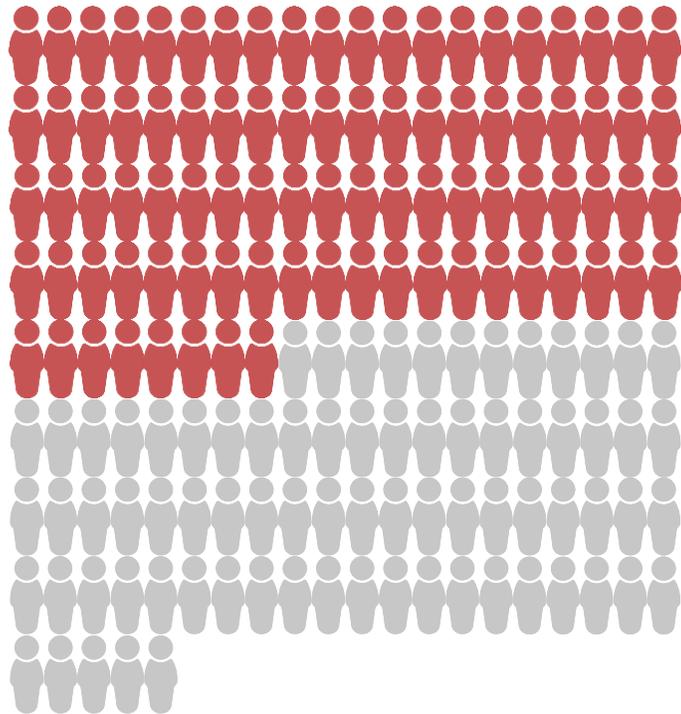


Urbanization

By 2050...

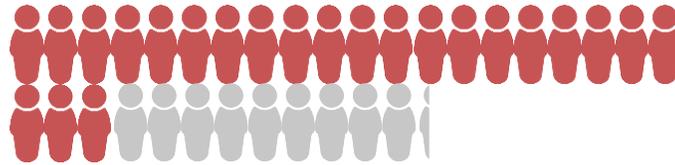
53%

of **Indians**
will live in urban centres



73%

of **Indonesians**
will live in urban centres



57%

of **Vietnamese**
will live in urban centres

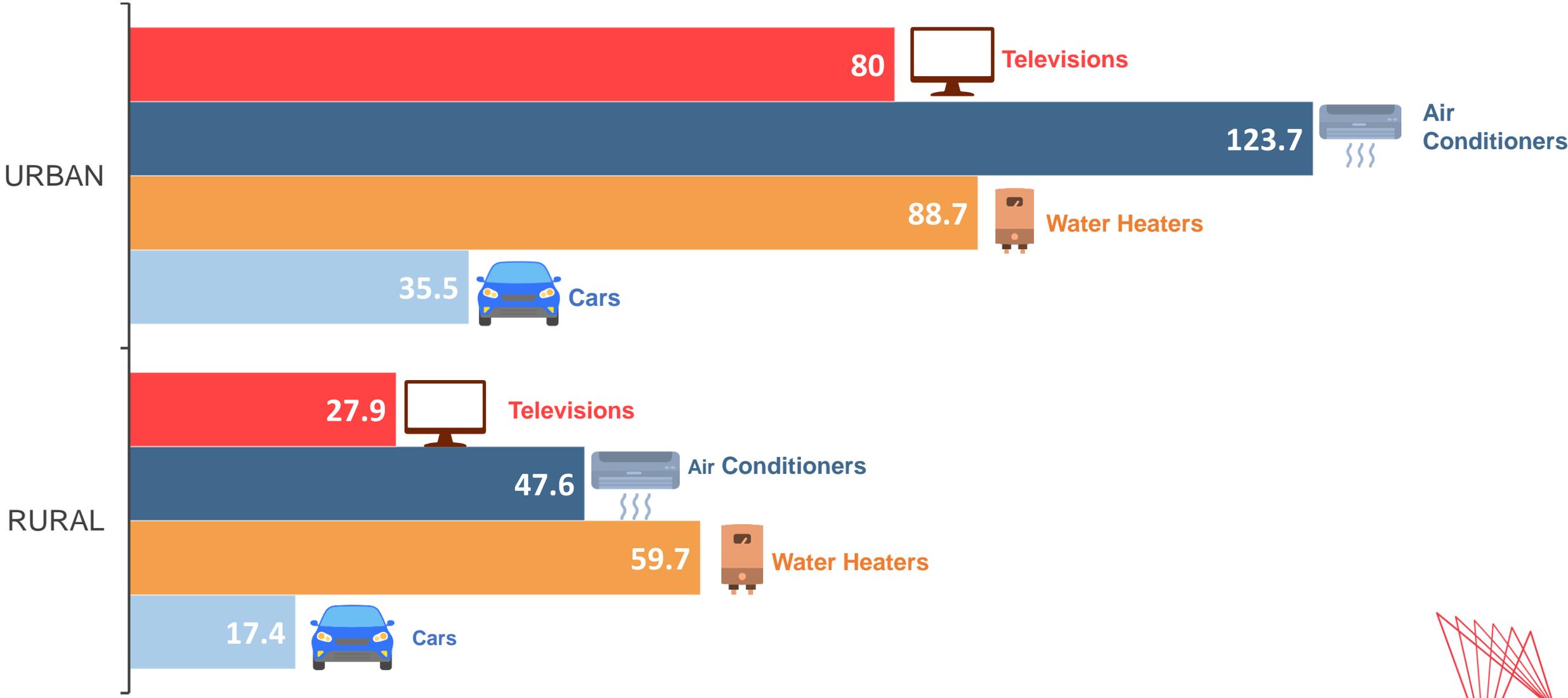


 = 10 million urban population

 = 10 million non-urban population



There is a large gap between urban and rural consumption in China.
In 2016, every 100 Chinese consumers owned...



Source: National Bureau of Statistics of China





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THANK YOU!

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PRESIDENT AND CEO

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