



The Conference Board of Canada

# THE FINAL FIFTEEN FEET OF HOSE

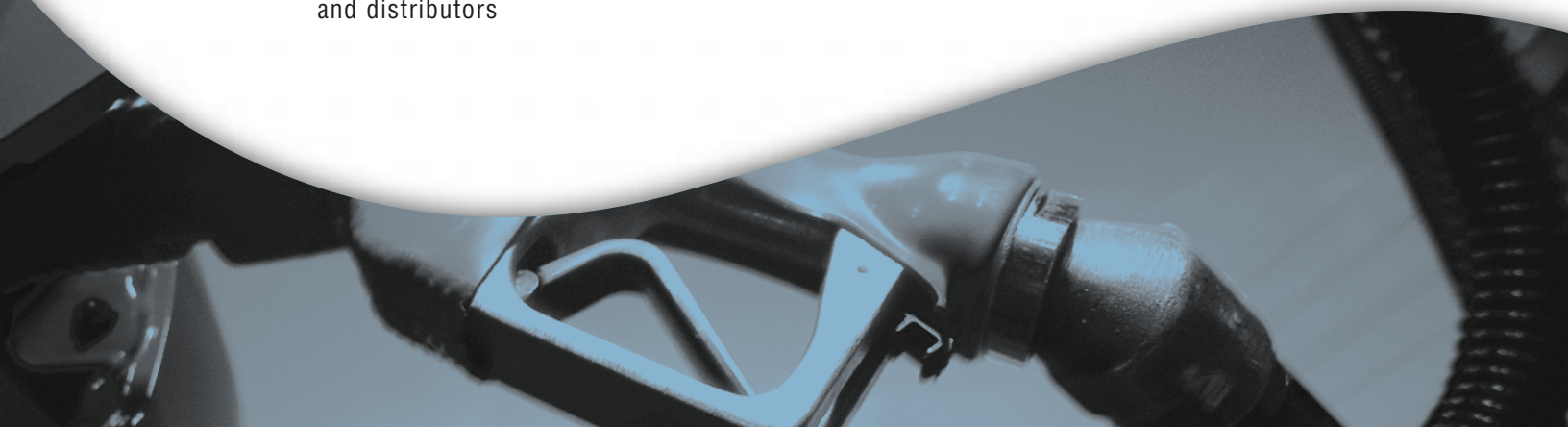
*The Canadian Gasoline Industry in the Year 2000*

## *Stakeholder Dialogue Sessions*

*January 2001*

### HIGHLIGHTS

- Participants validated most of the findings of the Conference Board research, particularly that:
  - motorists are well served by the gasoline industry in Canada
  - the major factors contributing to both high and increased gasoline prices are beyond the influence of the industry
  - street-level competition for the Canadian motorist's business is high
- Participant comments have resulted in extensive clarification and modification of the final research report
- Strain continues to exist in the relationship between refiner-marketers and independent gasoline retailers and distributors





## The Conference Board of Canada

### About The Conference Board of Canada

The Conference Board of Canada is an independent, not-for-profit research organization with affiliates in the United States and Europe. Our mission is to help our members anticipate and respond to the increasingly changing global economy. We do this through the development and exchange of knowledge about organizational strategies and practices, emerging economic and social trends and key public policy issues. Since 1954, the Board has been committed to researching innovative practices, designing new strategies and providing our members with the most up-to-date information, analysis and expertise to help them excel in Canada and around the world.

### About The Economic Services Group

The Economic Services Group is a research division at The Conference Board of Canada. The Group's purpose is to address the specific information requirements of the Conference Board's Associates by conducting financed research. Services include customized economic forecasting at the municipal, provincial, and national levels; economic impact analysis; custom-tailored econometric models; consumer and business attitudes surveys; and analysis of the economic implications of changes in public policy.

### Acknowledgements

The study was made possible through funding by Industry Canada and Natural Resources Canada. In keeping with Conference Board guidelines for financed research, the design and method of research as well as the content of this study were determined solely by The Conference Board of Canada.

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## *The Final Fifteen Feet of Hose: The Canadian Gasoline Industry in the Year 2000*

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Any open discussion of gasoline prices and the gasoline industry in Canada brings forward a broad range of viewpoints and strongly held opinions. Consumers are concerned about fair gasoline prices. They question whether they are being well served by an industry about which they have little understanding. Major and regional refiner-marketers are preoccupied with maintaining their profitability as well as with what they feel is a jaundiced public perception of them as monopolists and price gougers. Independent distributors and retailers are concerned about their own survival and competitiveness. They feel that they do not operate on the same level as the deep-pocketed refiner-marketers.

Bringing such a diverse group together poses a variety of challenges, particularly in terms of facilitating meaningful dialogue. In preparing the draft research report that was presented to participants, The Conference Board of Canada recognized that it would be impossible to please or meet the expectations of all the participants. Our goals in preparing the research were to be as independent and objective as possible, present an accurate portrait of the gasoline industry in Canada as well as respond to stakeholder preoccupations and concerns. Where possible, our findings have been supported by rigorous empirical analysis.

The general reaction to the research has been highly positive, although particular groups of stakeholders felt their positions and alternative analyses were not sufficiently represented in the document. Stakeholders generally regard the document as being clear and more complete and inclusive than previous studies on the topic. They generally feel that The Conference Board of Canada's empirical analysis brings a new element to the study of the gasoline industry and that the market outcome margin (referred to in the

draft as the "implicit target margin") is a unique tool that helps explain some of the dynamics of price changes.

It should be noted that there is a great deal of strain in the relationship between refiner-marketers and independent gasoline retailers and distributors. This tension was clear at various points during the dialogue sessions. Several areas were identified for further study that might help develop a stronger basis for common understanding between these two groups. Representative associations of both the independent retailers and the refiner-marketers support additional research in these areas. Suggestions for further study will be made later in the document.

Dialogue session participants were most helpful in suggesting areas that required modification and clarification. As a result of their constructive input, we believe that the final report is clearer and better reflects the divergence of opinion that exists among stakeholders.

## Introduction

Industry Canada and Natural Resources Canada contacted The Conference Board of Canada to study the Gasoline Industry in Canada in the Year 2000. As part of the Board's mandate, five dialogue sessions were held across Canada to validate the research outlined in the draft report and to seek feedback from stakeholders on its findings on the gasoline industry. This report on the dialogue component attempts to accurately reflect the comments received during these sessions. The final research report, *The Final Fifteen Feet of Hose*, to which this is an accompanying document, has been extensively adjusted to integrate many of the modifications and clarifications highlighted during these sessions. Some of these changes are discussed below.

## The Process

### Dialogue Objectives

The implementation of the Gasoline Dialogue Sessions was guided by four key objectives or desired outcomes:

- to achieve a shared understanding and communication of issues surrounding gasoline pricing in Canada;
- to validate the research and test the gaps between the findings and perceptions or beliefs among stakeholders;
- to create an environment for diverse interests to share their concerns about, and to start to develop a common understanding of, the issues and their origins; and
- to develop a regional perspective on the issues.

The Stakeholder Dialogue component consisted of a series of five regional symposia that were held across Canada.

One-day sessions were held in Vancouver, Calgary, Halifax, Montreal and Toronto. Delegates were invited to the dialogues, and, on average, 30 to 35 attended each session. They represented a diverse group of stakeholders, and are identified in the appendix to this report.

Invitations were sent to all stakeholder groups, including those directly involved in the gasoline industry, consumers' groups and the public. Attendance, however, was skewed towards those with a clear interest in the petroleum industry, although other stakeholder groups were represented. Slightly more than half of the number of participants derive their incomes directly from the Canadian petroleum industry.

Research findings, in the form of the full draft report, were circulated prior to the symposium.

### Design of the Stakeholder Dialogue Sessions

The Dialogue Sessions were designed using the underlying principles associated with large group interventions. Large group interventions involve whole systems, both internal and external, from a community or organizational context in order to resolve a common issue. In this case, the whole system includes the public, major and regional gasoline refiner-marketers, independent retailers, provincial governments and consumers' groups.

The chosen methodology was intended to create a dialogue between the many parties and the manifold issues they represent. The goal of this dialogue, which is supported by comprehensive and objectively produced research, was to begin to build a common understanding of the underlying interests of the parties.

Large group interventions use process-specific consultation techniques referred to as action research, facilitation skills and knowledge of adult learning principles to build an event agenda that assists in achieving stated objectives for the event.

Through a large group process, our intent was to start a dialogue among the diverse groups attending the sessions in order to build communication, relationships and, over time, some trust between the various stakeholder groups.

### Agenda for the Dialogue Sessions

Prior to attending the event of their choice, participants in the dialogues were provided with copies of the draft research report upon which to reflect and review.

At the dialogue sessions, attendees were reminded of the purpose of both the research and the stakeholder dialogues. They were also provided with an overview of the Conference Board mandate for the assignment as well as the Board's main attributes in undertaking the assignment, namely the Board's objectivity/independence, insights and networks.

Seating at tables was assigned to ensure a mix of interests within each group and a more active dialogue.

### Expectations

Delegates were asked to complete the sentence, *"This meeting will be successful for me if . . ."* After delegates introduced themselves to the other participants, they were asked to outline their individual expectations for the day and to share these expectations with the other delegates at their table. The views from the tables were then shared with the plenary group. The expectations were captured on flip charts and were revisited at the end of the day.

## Perspectives and Questions

At their tables, delegates then spent an hour focusing on their questions for the researchers. They were asked to answer two questions, take notes on flip charts and report back to the plenary group. The two questions were:

1. *What stood out/surprised you in the report? and*
2. *What questions would you have liked to ask the researchers?*

All tables reported back to the plenary group with their questions captured verbatim. The questions were grouped by theme and posted on the wall.

Following a presentation of the summary research findings by Conference Board officials and researchers, the session moderator readdressed each of the posted questions to the researchers. Floor questions were invited only after all the questions previously identified by the tables had been addressed.

## Finalizing the Report

In the afternoon session, delegates were asked a further question: *“Given the presentations and the responses to the questions, how do you feel about the report?”* The responses of participants were again captured on flip chart paper.

At this point the plenary session broke up into smaller work groups of five to six individuals. These smaller groups were then sent into breakout sessions and asked

to answer two additional questions: *“What is missing from the report?”* and *“What suggestions would you make to finalize the report?”* In addition, after bundling their responses to the second question, in their small groups delegates were requested to prioritize their responses to the question. A process called “dotmocracy” was used to achieve this task.

A rapporteur reported back to the plenary group. The small and large group members were also asked for any further clarification or additional questions.

## Closing of the Dialogue

The session closed with a review of the day’s expectations. Delegates were individually asked to share their comments and to answer the question, *“Were the expectations that you set out in the morning met or not?”*

## Data from the Dialogue Sessions

The data from all the dialogue sessions are captured on flip charts and are available upon request. They specifically address the responses to the questions presented by the Conference Board throughout the sessions. While the sessions were self-managed by the participants, senior Conference Board intervenors were available to assist the plenary and small group working sessions.

It should be noted that the participants’ expectations, comments and recommendations were strikingly similar in each region of the country.

The dialogue sessions were dominated by the attendance of participants who have a direct stake in the industry, particularly representatives of the refining-marketing and retailing sectors. Fully 52 per cent of attendees came from these areas, and another 22 per cent came from federal or provincial government ministries or agencies. And, although the research focused on whether Canadian consumers are well served by the gasoline industry in the year 2000, discussion during the dialogue sessions focused on the concerns of the refining and retailing sectors.

The dialogue sessions were primarily intended to validate the research presented in the draft report and provide input for its modification into a final report. While there was much discussion over particular points and issues in the study, the major contentions of the draft study were accepted by participants, specifically:

- *Canadian consumers are well served by the current state of the gasoline industry in Canada.* In the presentations, “well served” was further defined as providing consumers with the lowest possible prices along with an adequate supply of gasoline. The analysis of the industry showed that increased efficiencies and competitive conditions have resulted in lower retail and refining margins, which have translated into lower prices at the pump than might otherwise have been the case in a less efficient industry. Participants did not challenge this finding.
- *The rapid and dramatic increase in the world price of crude oil since January 1999 is the main culprit in the rapid increase of gasoline prices at the pump.* Dialogue session participants accepted this. It should be noted that those participants who represented motorist associations and other consumer groups underscored the role the various taxes play in high gasoline prices. However, they acknowledged that the change in price in crude oil is

the predominant factor in the increase in gasoline prices.

- *The petroleum industry itself has limited influence over gasoline prices, with crude oil and taxes making up between 80 and 85 per cent of the pump price.* After some discussion, participants agreed that Canada is a price taker when it comes to the world price of crude oil. In addition, most refiners are net purchasers of their crude requirements. People who are not directly involved in the industry were surprised at how little control wholesalers and retailers actually have over the major components of retail price.
- *At a wholesale level, gasoline needs to be considered on a continental basis, i.e., Canadian refineries need to remain competitive with U.S. refineries.* There was a great deal of debate and discussion as to whether there really is competition between U.S. and Canadian refineries, particularly given the changes in environmental standards that cause U.S. gasoline to differ from the product of most Canadian refineries. Nevertheless, all participants conceded that Canadian rack prices are set with the intention of keeping the import of U.S. product into Canada to a minimum. This was backed up by the research showing the high correlation between Canadian and U.S. rack prices. Many independent retailer representatives questioned the fairness of, or the motivation for, this practice. However, all participants agreed that U.S. rack prices exert a strong influence on the listed rack price at Canadian bulk gasoline terminals.
- *The street-level retailing of gasoline is highly competitive.* There was heated discussion over how price is set at the street level, as well as the relative influence of the different types of retailer. Participants agreed, however, that the vast majority of retailers in any given market are price takers. They must remain



competitive with the lowest price offered in their marketing area or risk losing a significant portion of their market share. The competition at the street level is an important factor in explaining the volatility of retail gasoline prices as well as their relative uniformity.

- *Canadian motorists are highly sensitive to differences in gasoline prices between stations.* This point was the subject of a great deal of discussion because of its anecdotal nature. Nevertheless, stakeholders from within the industry all acknowledged that most Canadians consider gasoline to be a homogeneous commodity. The product does not differ significantly from station to station, and, location and convenience being equal, consumers are more likely to buy their gasoline from the lowest priced station.
- *Average sales volume per station in a particular market is an important indicator of outlet efficiency as well as the ability to sustain low retail margins, all other factors being equal.* The Conference Board's research showed a strong negative correlation between average throughput and retail margins. In addition, we believe that a higher throughput supports an outlet's ability to spread its fixed costs over a higher volume of sales and is therefore an indicator of outlet efficiency. Stakeholders acknowledged the relationship between high volumes and low margins. Independents, however, sought acknowledgement from the rest of the participants that other indicators of efficiency exist that may be as appropriate, particularly the overhead costs per litre of gasoline sold. Unfortunately, data related to overheads is not easily accessible for all outlets, and definitions of overhead differ. Also, it is hard to compare different levels of ancillary sales and their contribution to meeting fixed costs. Sales volumes per outlet data are readily available for all the centres studied and have been an accepted measure to determine efficiency in the industry. The final draft report has added a section on site economics that hopefully will shed some light on the question of overheads and efficiency.
- *Differences in ex-tax prices between cities and regions are a function of differing competitive conditions.* Stakeholders acknowledged that dissimilar conditions existed in different cities, although the movement to single-price markets as well as zone pricing are minimizing these distinctions.
- *Long weekend price increases.* The Conference Board found that gasoline prices tend to rise before any weekend, not simply before long weekends. Stakeholders accepted this finding, although two major points were made—the role of the media in fostering the perception of long weekend price increases, and the responsibility of refiner-marketers for leading mid-week price increases.
- *Price asymmetry.* The Conference Board of Canada found that there is no empirical evidence of wholesale price increases being passed on to consumers faster than decreases. Stakeholders accepted the finding that price changes, both upward and downward, are generally passed on to consumers within a one-month period.
- *Cross-subsidization between business activities.* Research found that cross-subsidization exists between the activities of vertically integrated refiner-marketers. However, the research could not determine either the frequency or the magnitude of this interfinancing. Cross-subsidization was clearly the most contentious issue among participating stakeholders. Refiner-marketers defended cross-subsidization as a normal business practice that is used even by independent retailers to support gasoline margins through, for example, convenience store sales. They also contend that subsidies are not a standard feature of the industry. They are given only during extraordinary situations, such as price wars. Representatives of independent retailers believe that cross-subsidization is at the heart of the unequal playing field that they contend exists between branded and unbranded dealers. It is their strongly held conviction that branded retailers are paying a lower price for their gasoline on a regular basis and, therefore, can continue to support otherwise unsustainable retail margins.

As long as data concerning the actual supply price paid by all retail gasoline outlets are not universally available, it will be impossible to bring closure to this issue.
- *Comparison with the gasoline industry in the United States.* Many stakeholders believe that the study would be greatly enhanced by a much more in-depth analysis of the U.S. gasoline industry and a comparison with Canadian business practices at all levels of the distribution chain. The Conference Board of Canada's original proposal called for a full comparison—with a

parallel analysis of the American and Canadian markets for all points under study. However, the negotiation of the proposal and budget constraints limited the extent of the comparison. In order to resolve the issue of U.S.–Canadian comparisons, we have suggested a focused comparative survey on the areas of contention as a possible area for further study.

- *Communications strategy.* Participants all agreed that a remaining priority must be the communication to the general Canadian public about how the Canadian gasoline industry functions and how prices are determined. Delegates felt that the research study provides a useful tool to increase understanding on the subject. They reached a strong consensus that the report’s findings should be summarized in easily accessible language and format. These findings should be made widely available to the Canadian public.

### **The Relationship between Refiner-Marketers and Independent Retailers**

As can be seen from the discussion of the research findings, the major tension that exists among gasoline stakeholders is between refiner-marketers and independent retailers. The major issue of contention for independents is that they believe that refiner-marketers enjoy unfair advantages both at the refining and retailing levels and that these advantages are detrimental to independent gasoline retailers.

At the heart of this debate lies the issue of competition policy in Canada. Is it sufficient and is it applied appropriately, participants debated. However, commenting on this issue was beyond the mandate of the research undertaken.

### **Modification of the Draft Research Study**

As a result of comments and information received during the dialogue sessions, the draft report has been extensively clarified and modified in many important areas. New sections or highlight boxes have been added on such subjects as:

- Approach to the research
- The transformation from crude oil to retail gasoline
- Rack prices

- Import alternatives
- Refiner-independent retailer interface
- Branded independents
- Site economics
- Changing environmental standards
- Price volatility and uniformity
- Price restorations
- Market outcome margins (referred to in the Draft Report as “target margins”) and
- Comparison of Canadian centres.

In addition, sections on taxes, regulation and zone pricing have been expanded to cover issues raised by participants.

Discussions have been undertaken with the client for the preparation of a short, easy-to-understand pamphlet that will summarize the major findings of the study and their implications for Canadian motorists.

### **Suggested Areas for Further Study**

Several suggestions emerged as areas for possible further study to complement the work undertaken in The Conference Board of Canada’s report. It was felt that additional work on the following subjects would clarify some of the areas still unclear in the industry:

- *Detailed comparison between the Canadian and the U.S. gasoline industry.* The scope of this work should go beyond a simple quantitative analysis. Through a consultation process and detailed examination of selected U.S. markets, the research should present a clear picture of the similarities and differences between the two countries and how these differences affect all stakeholders. The examination should be undertaken at each level of the distribution chain, including the wholesale and retail gasoline sectors and the interface between the two. Differing business practices between Canada and the United States should also be examined.
- *Monitoring changes in Canadian wholesale and retail margins.* Much of The Conference Board of Canada’s analysis was undertaken during a time of rapidly increasing crude oil prices. The proof of the analysis will be the actions of the industry and reaction of wholesale and retail margins should crude prices fall significantly over a sustained period of time.

- *Determination of actual margins within the gasoline industry.* Delegates, particularly independents, consistently commented that the posted rack price for gasoline does not accurately reflect the true acquisition price paid by the majority of retailers in the Canadian market. There is a lack of transparency on issues such as discounts offered, guaranteed margins,

zone pricing and imputed acquisition prices. A greater understanding of these issues would require the full co-operation of, and disclosure by, all players in the industry, including both refiner-marketers and independent retailers. This information would clarify a variety of issues, including the extent and frequency of cross-subsidization within the petroleum industry.

## Appendix

### *Gasoline Dialogue Sessions—List of Attendees*

Sal	First	Last	Title	Company
Mr.	Donald	Affleck		Kelly Affleck Greene
Mr.	Ian	Anderson		Consumer and Corporate Affairs, Research and Planning Branch
Mr.	Wayne	Andrews		Government of Newfoundland and Labrador, Department of Mines and Energy
Mr.	Brian	Annis		NOCO Energy Limited
Mr.	Mike	Balfour	Assistant Director, Energy Economics Branch	Saskatchewan Energy and Mines
Mr.	Ross	Bayus	General Manager, Wholesale and Industrial Sales	Ultramar
Mr.	Jack	Belletrutti	Vice-President	Canadian Petroleum Products Institute
M.	Yves	Bériault	Partner	McCarthy Tétraut
Professeur	Jean-Thomas	Bernard		Département d'Économique, Université Laval
Mr.	René	Blouin	Président - directeur général	Association Québécoise des Indépendants du Pétrole
M.	Denis	Boulianne	Directeur Général	Canada Economic Development for Quebec Regions
Mr.	Barry	Bower	Senior Advisor, Petroleum	Ministry of Energy, Science and Technology
Mr.	Michael	Brown	Product Development Team Leader	Promoting Calgary
Mr.	Michael	Budd		Budd Consulting Group
Mr.	Brian	Burton	Writer	Petroleum Communication Foundation
Mr.	Bob	Clapp	Vice-President, Ontario Division	Canadian Petroleum Products Institute
Mr.	Guy	Cocquyt	Manager, Business Development	Prudential Steel Ltd.
Mr.	Bob	Collins	Energy Resource Analyst	Economic Development, Yukon
Mr.	David	Collins	President	Independent Retail Gasoline Marketers Association of Canada (IRGMA)
Mr.	Graham	Conrad		Nova Scotia Retail Gasoline Dealers Association
Mr.	Pat	Creaghan		Shell Canada Products Limited
Mr.	Pierre	Crevier	Membre de comité des Affaires économiques	Association Québécoise des Indépendants du Pétrole
Ms.	Kathy	Crooks	Vice-President, Branded Sales	Sunoco
Mr.	Steve	Denning	Senior Research Manager	Angus Reid Group
Mr.	Allen	Dever	Director, Corporate Communications	BC Rail Ltd.
Mr.	Hal	Dobbelsteyn	Program Administration Officer	Nova Scotia Department of Natural Resources—Energy Utilization Section
Prof.	Joseph	Doucet	Faculty of Business	University of Alberta
Mr.	Steve	Douglas	Sunoco Inc.	Director, Marketing & Stakeholder Relations
Mr.	John	Dunstall	Fuel Manager	5th Wheel Corp.
Mr.	Al	Dwyer	Registrar, Consumer Protection Branch	Saskatchewan Department of Justice
Mr.	Peter	Dyne	Chair of the Energy Committee	Consumers Association of Canada
Mr.	Louis	Forget		Ultramar Ltee
Mr.	Omer	Fournier	General Manager, Eastern Canadian Marketing	Irving Oil Limited
Mr.	André	Gagnon		Mr. Gas Limited
Mr.	Garry	Garcin	President	Groupe Pétrolier NORCAN Inc.
Mr.	Donald	Green		IRGMA
Mr.	Rick	Hammond	Vice President	GRA HAM Energy Ltd.
Mr.	Ron	Harper	Vice-President, Atlantic Division	Canadian Petroleum Products Institute
Dr.	Michelle	Heath	Senior Vice-President	Canadian Energy Research Institute
Ms.	Donna	Hildebrant	Manager, Communications Downstream	Petro-Canada
Mr.	Timothy	Hogarth	Chief Executive Officer	Pioneer Petroleums LP.
Mr.	Jim	Hughes	Manager, Corporate Planning Department	Imperial Oil
Mr.	Chuck	Husel	President	United Petroleum Products
Mr.	Georges	Iny	President	Automobile Protection Association
Ms.	Kristy	Johnstone	Manager, Marketing Administration	Chevron Canada Ltd.
Mr.	Frederick	Kaneb	Vice President, Marketing	OLCO Petroleum Inc.
Mr.	Steven	Keith	Manager, Pricing Relations	Petro-Canada
Ms.	Margaret	Kelsch	Marketing Services Manager—Automotive Division	Imperial Oil
Mr.	Peter	Kilty	Vice-President, Petroleum	Canadian Tire Corporation Ltd.
Mr.	Colin	King	Economist	Alberta Department of Resource Development
Mr.	Brian	Kitchen	Vice-President, Retail Operations	Pioneer Petroleums LP.
Mr.	Spencer	Knipping	Advisor, Oil	Ministry of Energy, Science and Technology
Ms.	Paula	Landry	Director, Public Affairs	Canadian Automobile Association—Quebec
Mr.	Dwight	Lawrence	Vice-President, Finance	MacEwan Petroleum Inc.
Mr.	Tom	Lawson	National Pricing Manager	Petro-Canada

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Sal	First	Last	Title	Company
Mr.	René	Lemire		Petro-Canada
Mr.	David	Leonhardt	Public & Government Relations Director	Canadian Automobile Association—Ontario
Mr.	Bill	Levy	Vice-President, Western Division	CPPI
Mr.	William	Linley	Acting Executive Director, Strategic Services	Nova Scotia Department of Economic Development
Ms.	Anne	Logan		FEESA, An Environmental Educational Society
Mr.	Kyle	Logan		Irving Oil Limited
Mr.	Robert	Lyman	Senior Director - Oil Division	Natural Resources Canada
Mr.	Don	Macyk	Director, Economics and Competitiveness	Alberta Agriculture, Food and Rural Development
Mr.	Malcolm	Madden	President	Nova Scotia Retail Gasoline Dealers Association
Ms.	Sonia	Marcotte	Directrice des Affaires économiques et juridiques	Association Québécoise des Indépendants du Pétrole
Prof.	Christian	Marfels		Dalhousie University - Economics Department
Mr.	Bob	Marsh	Director, Adaptive Service Delivery	Ministry of Environment, Lands & Parks
	Robyn	McIssac	Director, Communications	Nova Scotia Department of Business and Consumer Services
Mr.	Scott	Meis	Director, Research	Canadian Tourism Commission
Mr.	James	Miller	Senior Vice-President, Corporate Affairs	Honda Canada Inc.
Mr.	Bill	Milliken	Media Rep. For CPPI	Canadian Petroleum Products Institute
Mr.	Sharon	Moffat	Manager of Purchasing	Western Forest Products Limited
Mr.	Carol	Montreuil	Vice-President	Canadian Petroleum Products Institute—Quebec Division
Mr.	Tim	Moro	Vice-President	Angus Reid Group
Mr.	Peter	O'Brien		Canadian Federation of Independent Business
Ms.	Wendy	Olan		National Energy Board
Mme.	Majlinda	Osmanllier	Economiste	Automobile Protection Association
Mr.	Stephen	Pearce	Vice-President, Marketing and Development	Tourism Saskatchewan
M.	Andrew	Pelletier	Directeur, Communications de la Société	Petro-Canada
Mr.	Alain	Perez		Canadian Petroleum Products Institute
Mr.	Mike	Proud	Energy Advisor	P.E.I. Department of Development - Energy and Mineral Sector
Mr.	John	Ratel	Director, Government Affairs	Canadian Automobile Association—British Columbia
Mr.	Colin	Robbins	President	Robbins Fuels
Mr.	Roger	Rowley	Executive Director	Petroleum Communication Foundation
Mr.	Bill	Runciman		7-Eleven Canada Inc.
Mr.	Mike	Russill	Sunoco Inc.	Vice-president, Marketing and Network Development
Mr.	Dominic	Scipio	General Manager	Petrols Sonic Inc.
Mr.	Manju	Sekhri	Executive Vice-President and Program Director	Independent Retail Gasoline Marketers Association of Canada
Mr.	Harold	Selig	President	South Shore Fuels
Mr.	Richard	Shaffner	Director, Policy and Regulatory Affairs	Nova Scotia Department of Business and Consumer Services
Ms.	Audrey	Simmons		Alberta Department of Resource Development
Mr.	William	Simpkins	Vice-President	Canadian Petroleum Products Institute
Mr.	Dick	Smyth	Vice-President	The Canadian Manufacturers and Exporters Association
Ms.	Sandra	Sobko	Communications Manager	Petroleum Communication Foundation
Mr.	Lloyd	Stamm	Coordinator	Automotive Retailers Association of B.C.
Mr.	Les	Stewart		Canadian Petroleum Products Institute
Mr.	Don	Stonehouse	Manager, Transportation Policy Development	Nova Scotia Department of Transportation and Public Works
Ms.	Jo'Anne	Strekaf	Vice Chair, Enforcement, Competition Law Section	Canadian Bar Association
Mr.	Robert	Taylor	Director, Government and Consumer Affairs	Alberta Motor Association
Mr.	Jack	Therhault	Senior VP, Retail Sales & Marketing	Pioneer Petroleum LP.
Mr.	Serge	Therrien	Président du comité des affaires économiques	Association Québécoise des Indépendants du Pétrole
Mr.	Neville	Thomas		Richmond Chamber of Commerce
Mr.	Bruce	Thomson	President	Sipco Oil Limited
Mr.	Randy	Turner	Chair person	Ontario Fuel Dealers' Association
Mr.	Eymbert	Vaandering	Vice-President, Petroleum	Canadian Tire Corporation Ltd.
Mr.	Shane	Walsh	Research and Planning Officer	Department of Natural Resources and Energy
	Kim	West	Vice-President, Public Affairs	McArthur, Thompson and Law
Mr.	Ian	Wilson	President	Wilson Fuel Company Ltd.
Mr.	Martin	Wingess	Research Manager	Ottawa Tourism and Convention Authority







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