



THE OIL SANDS
DEVELOPERS GROUP

Energy From Athabasca

Oil Sands Project List

Updated as of June 2011

Existing and proposed oil sands projects

1) Operating Projects: 2.085 M bbl/d

- Mining - 1.210 M bbl/d
- in-situ - 0.875 M bbl/d

2) Under Construction: 0.785 M bbl/d

- Mining - 0.290 M bbl/d
- in-situ - 0.495 M bbl/d

3) Projects with Regulatory Approval 1.946 M bbl/d

- Mining - 1.040 M bbl/d
- in-situ - 0.906 M bbl/d

4) Projects Under Regulatory Review: 1.169 M bbl/d

- Mining - 0.420 M bbl/d
- in-situ - 0.689 M bbl/d

5) Projects Announced / Disclosed: 2.993 M bbl/d

- Mining – 0.530 M bbl/d
- In-situ – 2.463 M bbl/d

Oil Sands Mining Projects – Summary

Project Status	Production Capacity (bbl/day)
Projects in Operation	1,210,000
Projects Under Construction	290,000
Projects with Regulatory Approval	1040,000
Projects Under Regulatory Review	420,000
Projects Announced/Disclosed	530,000
Total Production Capacity	3,490,000

Projects Operating - Mining

Mining	Bitumen Capacity (bpd)	Region
Shell Albian Sands - Muskeg River Mine	155,000	Athabasca
Shell Albian Sands – Jackpine Ph 1A	100,000	Athabasca
Canadian Natural Resources - Horizon Mine - Phase 1	135,000	Athabasca
Canadian Natural Resources - Horizon Mine - Phase 2/3 : Tranche 1	92,000	Athabasca
Suncor Energy - Millennium/ Steepbank Mine	321,000	Athabasca
Syncrude- Mildred Lake/Aurora North Mines - Stages 1 & 2 & 3 Expansion	407,000	Athabasca
Total	1,210,000	

Projects Under Construction - Mining

Mining	Est. Start Up Production	Bitumen Capacity (bpd)	Mining
Canadian Natural Resource Ltd. – Phase 2/3 – Trance 2	TBD	TBD	Athabasca
Imperial Oil – Kearl Mine – Phases 1	2012	110,000	Athabasca
Suncor Energy – North Steepbank Mine -Expansion	C suspended	180,000	Athabasca
Total		290,000	

Projects With Regulatory Approval – Mining

Mining	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Shell Albian Sands- Jackpine Mine - Phase 1B	Target 2014	100,000	Athabasca
Shell Albian Sands - Muskeg River Mine - Expansion and Debottlenecking	TBD	115,000	Athabasca
Imperial Oil - Kearl Mine - Phases 2 & 3	2015-2021	200,000	Athabasca
Suncor Energy - Fort Hills Mine - Phase 1 & Debottlenecking	2016	190,000	Athabasca
Syncrude - Aurora South – Train 1	2016-2019	100,000	Athabasca
Syncrude – Aurora South – Train 2	2018	100,000	Athabasca
Canadian Natural Resources Ltd. – Horizon Ph 2/3	TBD	135,000	Athabasca
Total E&P Canada – Joslyn Mine North – Ph 1-2	2017	100,000	Athabasca
Total		1040,000	

Projects Under Regulatory Review – Mining

Mining	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Shell Albian Sands- Jackpine Mine - Phase 3	TBD	100,000	Athabasca
Athabasca Oil Sands Project (Shell) – Pierre River Mine - Phases 1 & 2	2018	200,000	Athabasca
Suncor - Voyageur South Mine - Phase 1	TBD	120,000	Athabasca
Total		420,000	

Projects Announced/Disclosed – Mining

Mining	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Canadian Natural Resources – Horizon Mine - Phase 2/3 Expansion - Tranche 2-4	TBD	140,000	Athabasca
Total E&P Canada – Joslyn Mine South	TBD	100,000	Athabasca
SilverBirch Energy/Teck Energy – Frontier Mine – Phases 1, 2 & 3	TBD	240,000	Athabasca
SilverBirch Energy/Teck Energy – Equinox Mine – Phase 4	TBD	50,000	Athabasca
Total		530,000	

Oil Sands In-situ Projects – Summary

Project Status	Production Capacity (bbl/day)
Projects in Operation	875,000
Projects Under Construction	495,500
Projects With Regulatory Approval	905,955
Projects Under Regulatory Review	689,500
Projects Announced/Disclosed	2,463,000
Total Production Capacity	5,488,955

Projects Operating – In-situ (1)

In-situ	Bitumen Capacity (bpd)	Region
Canadian Natural Resources Ltd. - Primrose East (Burnt Lake)	40,000	Cold Lake
Canadian Natural Resources Ltd. - Primrose North	35,000	Cold Lake
Canadian Natural Resources Ltd. - Primrose South	45,000	Cold Lake
Canadian Natural Resources Ltd. - Wolf Lake	13,000	Cold Lake
Cenovus Energy Inc. - Christina Lake Phases 1 A-B	18,000	Athabasca
Cenovus Energy Inc. – Grande Rapids Pilot	600	Athabasca
Cenovus Energy Inc. - Foster Creek Phases A-E	120,000	Athabasca
Connacher Oil and Gas - Great Divide Pod 1	10,000	Athabasca
Connacher Oil and Gas - Great Divide Pod 2 (Algar)	10,000	Athabasca
ConocoPhillips/ Total E&P - Pilot	1,200	Athabasca
ConocoPhillips/ Total E&P - Surmont Phase I	27,000	Athabasca
Devon Canada Limited - Jackfish 1 & 2	70,000	Athabasca
E-T Energy - Pilot	1,000	Athabasca
Husky Energy - Tucker Phase 1	30,000	Cold Lake
Imperial - Cold Lake Phases 1-10: Leming, Maskwa, Mahihkan	110,000	Cold Lake
Imperial - Cold Lake Phases 11-13: Mahkeses	30,000	Cold Lake

Projects Operating – In-situ (2)

In-situ	Bitumen Capacity (bpd)	Region
Japan Canada Oil Sands - Hangingstone Pilot	11,000	Athabasca
Larcina – Saleski Pilot	1,800	Athabasca
MEG Energy - Christina Lake Reg. Project Phase 1	3,000	Athabasca
MEG Energy - Christina Lake Reg. Project Phase 2A	22,000	Athabasca
Nexen Inc. - Long Lake Phase 1	72,000	Athabasca
Southern Pacific Energy - Red Earth CSS Pilot	1,000	Peace River
Petrobank Energy & Resources Ltd. - Whitesands Pilot	1,900	Athabasca
Shell Canada -Cliffdale Battery	27,000	Peace River
Shell Canada - Orion Phase 1	10,000	Cold Lake
Shell Canada - Peace River Complex - Cadotte Lake	12,500	Peace River
Shell Canada - Seal Battery	10,000	Peace River
Shell Canada - Seal Battery - Expansion	13,000	Peace River

Projects Operating – In-situ (3)

Suncor Energy Inc. - Firebag Cogeneration and Expansion	25,000	Athabasca
Suncor Energy Inc. - Firebag Phase 1	35,000	Athabasca
Suncor Energy Inc. - Firebag Phase 2	35,000	Athabasca
Suncor Energy Inc. - MacKay River	33,000	Athabasca
Sunshine Oilsands Ltd. – Harper Carbonate Pilot	1,000	Athabasca
Total	875,000	

Projects Under Construction – In-situ

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Black Pearl Resources – Blackrod Pilot	2011	500	Athabasca
Canadian Natural Resources Ltd. – Kirby Ph 1	2-13	40,000	Athabasca
Cenovus Energy Inc. - Christina Lake: Phase C	2011	40,000	Athabasca
Cenovus Energy Inc. - Christina Lake: Phase D	2013	40,000	Athabasca
ConocoPhillips Canada – Surmont Ph 2	2015	83,000	Athabasca
Devon Canada Limited - Jackfish 2	2011	35,000	Athabasca
Harvest Operations Corp. – Blackgold Ph 1	2013	10,000	Athabasca
Husky Energy - Sunrise	2014	60,000	Athabasca
Laricina – Germain Commercial Demo Ph 1	2012	5,000	Athabasca
MEG Energy – Christina Lake Ph 2B	2013	35,000	Athabasca
Statoil Canada Ltd. - Kai Kos Dehseh - Leismer Demo	2011	10,000	Athabasca
Southern Pacific – Ph 1	2012	12,000	Athabasca
Suncor Energy Inc. - Firebag Phase 3	2011	62,500	Athabasca
Suncor Energy Inc. - Firebag Phase 4	2012	62,500	Athabasca
Total		495,500	

Projects With Regulatory Approval – In-situ (1)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Alberta Oilsands Inc. - Clearwater Pilot (West)	2012	10,000	Athabasca
Athabasca Oil Sands Corp. - Dover Central Pilot	N/A	2,000	Athabasca
Athabasca Oil Sands Corp. - Dover Commercial Phase 1	2015	40,000	Athabasca
Athabasca Oil Sands Corp. - MacKay River Commercial Phase 1	2014-2022	35,000	Athabasca
Athabasca Oil Sands Corp. - MacKay River Commercial Phase 2-4	TBD	115,000	Athabasca
Athabasca Oil Sands Corp. - MacKay River Pilot	2010	2,200	Athabasca
Canadian Natural Resources Ltd. - CSS Follow-up Process	2018	30,000	Cold Lake
Canadian Natural Resources Ltd. - Wolf Lake SAGD	TBD	5,500	Cold Lake
Cenovus Energy Inc. - Borealis Phase A	TBD	35,000	Athabasca
Cenovus Energy Inc. - Christina Lake 1E-F-G	2015-2017	40,000	Athabasca
Cenovus Energy Inc. - Foster Creek Phases F	2014	30,000	Cold Lake
Cenovus Energy Inc. - Foster Creek Phases G	2016	30,000	Cold Lake
Cenovus Energy Inc. - Foster Creek Phases H	2017	30,000	Cold Lake
E-T Energy - Poplar Creek ET-DSP Project Ph. 1	2011	10,000	Athabasca
Excelsior Energy - Hangingstone Experimental	2011	1,000	Athabasca
Grizzly Oil Sands - Algar Lake	2013	11,300	Athabasca
Husky Energy - McMullen	TBD	755	Athabasca
Southern Pacific Resource Corp. - STP McKay Project	2013	12,000	Athabasca

Projects With Regulatory Approval – In-situ (2)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Japan Canada Oil Sands - Hangingstone Phase 1	2014	35,000	Athabasca
Koch Exploration Canada - Gemini	2012	10,000	Cold Lake
Koch Exploration Canada - Pilot	TBD	1,200	Cold Lake
MEG Energy - Christina Lake Phases 3A,B,C	2014-2018	150,000	Athabasca
Osum Oil Sands Corp - Taiga	2014	35,000	Cold Lake
Pengrowth Energy Trust - Lindbergh pilot	TBD	2,500	Cold Lake
Penn West Energy Trust - Seal Main -Pilot	TBD	3,000	Peace River
Petrobank Energy & Resources Ltd. - May River Phase 1	2014	10,000	Athabasca
Shell Canada - Carmon Creek Phases 1& 2	TBD	80,000	Peace River
Statoil Canada Ltd. - Kai Kos Dehseh - Leismer Expansion Hub	2012-2014	40,000	Athabasca
Statoil Canada Ltd. - Kai Kos Dehseh -Leismer Commercial Hub	2012-2034	20,000	Athabasca
Suncor Energy Inc. - Firebag stages 3-6 Debottlenecking	TBD	23,500	Athabasca
Value Creation Group -TriStar Pilot Project	2012	1,000	Athabasca
Canadian Natural Resources Ltd. - Kirby	2013	45,000	Athabasca
Enerplus Resource Fund -Kirby Phase 1	TBD	10,000	Athabasca
Total		905,955	

Projects Under Regulatory Review – In-situ (1)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Andora Energy - Sawn Lake	TBD	700	Peace River
ConocoPhillips/ Total E&P - Surmont Ph. II	2015	83,000	Athabasca
Husky Energy - Caribou Demonstration Project	TBD	10,000	Cold Lake
Husky Energy - Sunrise Ph.2-3	2020	140,000	Athabasca
Imperial - Cold Lake Phases 14-16: Nabiye, Mahihkan North	TBD	30,000	Cold Lake
Korea National Oil Corporation - Black Gold	2012	10,000	Athabasca
Laricina Energy - Germain	TBD	5,000	Athabasca
Nexen Inc. - Long Lake Ph.2 (Kinosisis)	TBD	72,000	Athabasca

Projects Under Regulatory Review – In-situ (2)

in-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Petrobank Energy & Resources Ltd. - Whitesands - Expansion	2011	1,800	Athabasca
Shell Canada - Orion Phase 2	TBD	10,000	Cold Lake
Suncor Energy Inc. - Firebake Phase 5	TBD	62,500	Athabasca
Suncor Energy Inc. - Firebake Phase 6	TBD	62,500	Athabasca
Suncor Energy Inc. - Meadow Creek	TBD	40,000	Athabasca
Suncor Energy Inc. - Meadow Creek Phase 2	TBD	40,000	Athabasca
BP / Value Creation- Terre de Grace Pilot	TBD	10,000	Athabasca
Nexen Inc. - Long Lake Ph. 3	TBD	72,000	Athabasca South
Suncor Energy Inc. - MacKay River Phase 2	TBD	40,000	Athabasca
Total		749,500	

Projects Announced/Disclosed – In-situ (1)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Alberta Oilsands Inc. -Clearwater East Commercial	2013	10,000	Athabasca
Alberta Oilsands Inc. - Clearwater North Commercial	2014	10,000	Athabasca
Athabasca Oil Sands Corp -Hangingstone	TBD	50,000	Athabasca
Athabasca Oil Sands Corp. - Dover West Additional Phases	TBD	165,000	Athabasca
Athabasca Oil Sands Corp. - Birch	TBD	88,000	Athabasca
Athabasca Oil Sands Corp. -Dover West Phase 1	2016	50,000	Athabasca
Canadian Natural Resources Ltd. -Birch Mountain East	2016	60,000	Athabasca
Canadian Natural Resources Ltd. - Gregoire Lake 1	2018	60,000	Athabasca
Canadian Natural Resources Ltd. -Grouse Ph.1	2014	60,000	Athabasca
Canadian Natural Resources Ltd. - Leismer Phase 1	2020	30,000	Athabasca
Cenovus Energy Inc. - Borealis Phases B & C	TBD	65,000	Athabasca
Cenovus Energy Inc. - East Fort McMurray	TBD	60,000	Athabasca
Cenovus Energy Inc. -Grand Rapids Phase A	2017	60,000	Athabasca
Cenovus Energy Inc. - Grand Rapids Phase B	TBD	60,000	Athabasca
Cenovus Energy Inc. - Grand Rapids Phase C	TBD	60,000	Athabasca

Projects Announced/Disclosed – In-situ (2)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Cenovus Energy Inc. - Narrows Lake Phases A-C	2016	130,000	Athabasca
Cenovus Energy Inc. - Steepbank	TBD	30,000	Athabasca
Cenovus Energy Inc. - Telephone Lake: Phase A	TBD	35,000	Athabasca
Cenovus Energy Inc. - Telephone Lake: Phase B	TBD	15,000	Athabasca
Cenovus Energy Inc. - West Kirby	TBD	30,000	Athabasca
Cenovus Energy Inc. - Winefred Lake	2019	60,000	Athabasca
Chevron Canada - Ells River	TBA	35,000	Athabasca
Connacher Oil and Gas - Great Divide Expansion Project	2014	24,000	Athabasca
Connacher Oil and Gas - Hanging Stone Halfway Creek	2013	10,000	Athabasca
Devon Canada Limited - Jackfish 3	2015	35,000	Athabasca
Devon Canada Limited - Kirby	TBD	N/A	Athabasca
Enerplus Resource Fund - Kirby Ph. 2	TBD	25,000	Athabasca
E-T Energy - Poplar Creek ET-DSP Project Expansion	2014	100,000	Athabasca
Excelsior Energy - Hangingstone Build out 1-3	TBD	80,000	Athabasca
Ivanhoe Energy - Tamarack	2014	20,000	Athabasca
Korea National Oil Corporation - Black Gold Phase 2	2015	20,000	Athabasca

Projects Announced/Disclosed – In-situ (3)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Laricina Energy - Germain Phase 1	TBD	10,000	Athabasca
Laricina Energy - Saleski Phase 1	2013	10,000	Athabasca
Nexen Inc. -Long Lake Phase 4-6	TBD	216,000	Athabasca
North Peace Energy - Red Earth Commercial Project	TBD	20,000	Peace River
North Peace Energy - Red Earth Expansion	TBD	3,000	Peace River
Patch International Inc. - Ells River	TBD	10,000	Athabasca
Penn West Energy Trust - Seal North and Cadotte	TBD	3,000	Peace River
Petrobank Energy & Resources Ltd. - May River Expansion	TBD	90,000	Athabasca
Southern Pacific Resource Corp. – Phase 2 – STP McKay Thermal	2015	24,000	Athabasca
Statoil Canada Ltd. - Kai Kos Dehseh - Corner	2015-2016	50,000	Athabasca
Statoil Canada Ltd. - Kai Kos Dehseh - Hangingstone	TBD	20,000	Athabasca
Statoil Canada Ltd. - Kai Kos Dehseh - Thornbury	TBD	40,000	Athabasca
Statoil Canada Ltd. - Northwest Leismer	TBD	20,000	Athabasca
Statoil Canada Ltd. - South Leismer	TBD	20,000	Athabasca
Suncor Energy Inc. - Chard	TBD	40,000	Athabasca

Projects Announced/Disclosed – In-situ (4)

In-situ	Est. Start Up Production	Bitumen Capacity (bpd)	Region
Suncor Energy Inc. - Lewis Phase 1	TBD	40,000	Athabasca
Suncor Energy Inc. - Lewis Phase 2	TBD	40,000	Athabasca
Sunshine Oil Sands - Legend Lake Phase 1	2014	10,000	Athabasca
Sunshine Oil Sands - Legend Lake Phase 2	TBD	20,000	Athabasca
Sunshine Oil Sands - Legend Lake Phase 3	TBD	20,000	Athabasca
Sunshine Oil Sands - Thickwood Phase 1 & 2	TBD	10,000	Athabasca
Sunshine Oil Sands - Thickwood Phase 3	TBD	20,000	Athabasca
Sunshine Oil Sands - Thickwood Phase 4	TBD	20,000	Athabasca
Sunshine Oil Sands - West Ells Phase 3	TBD	40,000	Athabasca
Sunshine Oil Sands - West Ells Phase 4	TBD	40,000	Athabasca
Sunshine Oil Sands - Terre de Grace Phase 1	TBD	10,000	Athabasca
BP / Value Creation Group - Terre de Grace Phase 1	TBD	40,000	Athabasca
BP / Value Creation Group - Terre de Grace Phase 2	TBD	40,000	Athabasca
Total		2,463,000	

Disclaimer

This presentation contains forward-looking information. Actual results could differ materially due to market conditions, changes in law or government policy, changes in operating conditions and costs, changes in project schedules, operating performance, demand for oil and gas, commercial negotiations or other technical and economic factors.

Data sources: All data used in the project lists are publicly available.

For more information contact:

The Oil Sands Developers Group
617 – 8600 Franklin Avenue
Fort McMurray, AB T9H 4G8
Canada
Ph: 780-790-1999

E-mail: info@oilsandsdevelopers.ca

