



THE OIL SANDS
DEVELOPERS GROUP

Energy From Athabasca

Oil Sands Project List

Updated as of January 2012

Existing and proposed oil sands projects

1) Producing Projects: 1,853,650 barrels per day

- Mining - 921,000 barrels per day
- In-situ - 932,650 barrels per day

2) Under Construction: 714,905 barrels per day

- Mining - 295,000 barrels per day
- In-situ – 419,905 barrels per day

3) Projects with Regulatory Approval 2,199,650 barrels per day

- Mining - 1,390,000 barrels per day
- In-situ - 809,650 barrels per day

4) Projects Under Regulatory Review: 1,981,270 barrels per day

- Mining - 600,000 barrels per day
- In-situ - 1,381,270 barrels per day

5) Projects Announced / Disclosed: 1,489,500 barrels per day

- Mining – 100,000 barrels per day
- In-situ – 1,389,500 barrels per day

Oil Sands Mining and In-Situ Projects – Summary

Project Status	Production Capacity (barrels per day) Mining	Production Capacity (barrels per day) In -Situ
Projects in Operation	921,000	932,650
Projects Under Construction	295,000	419,905
Projects with Regulatory Approval	1,390,000	809,650
Projects Under Regulatory Review	600,000	1,381,270
Projects Announced/Disclosed	100,000	1,389,500
Total Production Capacity	3,306,000	4,932,975

Projects Operating - Mining

Mining	Bitumen Capacity (barrels per day)	Region
Suncor Energy Inc. : Base operations Millennium debottlenecking	23,000	Athabasca North
Suncor Energy Inc.: Base operations Millennium mine	294,000	Athabasca North
Suncor Energy Inc.: Base operations steepbank debottleneck phase 3	4,000	Athabasca North
Canadian Natural Resources Ltd.: Horizon Phase 1	135,000	Athabasca North
Shell Albian Sands: Jackpine phase 1A	100,000	Athabasca North

Projects Operating – Mining continued

Mining	Bitumen Capacity (barrels per day)	Region
Syncrude Canada Ltd. : Mildred Lake/Aurora North & South base mine stage 1 & 2 expansion	135,000	Athabasca North
Syncrude Canada Ltd.: Mildred Lake/Aurora North & South stage 3 expansion	75,000	Athabasca North
Shell Albian Sands: Muskeg river commercial	155,000	Athabasca North
Total:	921,000	

Projects Under Construction - Mining

Mining	Bitumen Capacity (bpd)	Mining
Suncor Energy Inc.: Base operations north steepbank extension	180,000	Athabasca North
Canadian Natural Resources Ltd.: Horizon Tranche 2	5,000	Athabasca North
Total	185,000	

Projects Under Regulatory Review – Mining

Mining	Bitumen Capacity (bpd)	Region
SilverBirch Energy Corporation: Frontier phase 1	80,000	Athabasca North
SilverBirch Energy Corporation: Frontier phase 2	80,000	Athabasca North
SilverBirch Energy Corporation: Frontier phase 3	80,000	Athabasca North
SilverBirch Energy Corporation: Frontier phase 4 Equinox	40,000	Athabasca North
Shell Albian Sands: Pierre river phase 1	100,000	Athabasca North
Shell Albian Sands: Pierre river phase 2	100,000	Athabasca North
Suncor Energy Inc.: Voyageur south phase 1	120,000	Athabasca North
Total	600,000	

Projects With Regulatory Approval – Mining

Mining	Bitumen Capacity (bpd)	Region
Syncrude Canada Ltd. :Aurora South train 2	215,000	Athabasca North
Syncrude Canada Ltd. :Aurora South train 1	200,000	Athabasca North
Canadian Natural Resources Ltd. :Horizon Phase 2A	10,000	Athabasca North
Canadian Natural Resources Ltd. :Horizon Phase 2B	45,000	Athabasca North
Canadian Natural Resources Ltd. : Horizon Phase 3	80,000	Athabasca North
Shell Albian Sands:Jackpine Expansion	100,000	Athabasca North

Projects With Regulatory Approval Continued – Mining

Mining	Bitumen Capacity (bpd)	Region
Total E&P Canada: Joslyn North Mine phase 1	100,000	Athabasca North
Imperial Oil: Kearl Phase 2	235,000	Athabasca North
Shell Albian Sands: Muskeg river expansion & debottlenecking	115,000	Athabasca North
Suncor Energy Inc.: Fort hills debottleneck		Athabasca North
Suncor Energy Inc.: Fort hills phase 1	25,000	Athabasca North
Total:	1,390,000	

Projects Announced/Disclosed – Mining

Mining	Bitumen Capacity (bpd)	Region
Total E&P Canada: Joslyn South Mine phase 1	100,000	Athabasca North
Total	100,000	

Projects Operating – In-situ (1)

In-situ	Bitumen Capacity (bpd)	Region
BlackPearl Resources Inc. blackrod commercial	500	Athabasca South
Primrose/Wolf Lake primrose east	32,000	Cold Lake
Primrose North	30,000	Cold Lake
Primrose South	45,000	Cold Lake
Wolf Lake	13,000	Cold Lake
Christina Lake phase 1A	10,000	Athabasca South
Christina Lake phase 1B	8,800	Athabasca South
Christina Lake phase C	40,000	Athabasca South
Foster Creek phase A	24,000	Athabasca South
Foster Creek phase B Debottleneck	6,000	Athabasca South
Foster Creek phase C stage 1	10,000	Athabasca South
Foster Creek phase C stage 2	20,000	Athabasca South
Foster Creek phase D	30,000	Athabasca South
Foster Creek phase E	30,000	Athabasca South
Grand Rapids pilot	600	Athabasca South
Great Divide algar pod 2	10,000	Athabasca South
*Project information valid as of January 2012 Public sources used.		10

Projects Operating – In-situ (2)

In-situ	Bitumen Capacity (bpd)	Region
Pod 1	10,000	Athabasca South
Surmont phase 1	27,000	Athabasca South
Surmont pilot	1,200	Athabasca South
Jackfish phase 1	35,000	Athabasca South
Jackfish phase 2	35,000	Athabasca South
Poplar Creek pilot	1,000	Athabasca North
Tucker phase 1	30,000	Cold Lake
Cold Lake phase 1-10	110,000	Cold Lake
Cold Lake phase 11-13	30,000	Cold Lake
Hangingstone Pilot	11,000	Athabasca South
Saleski pilot	1,800	Athabasca South
Christina lake phase 1 pilot	3,000	Athabasca South
Christina lake phase 2A	22,000	Athabasca South
Long Lake phase 1	72,000	Athabasca South
Cadotte Lake	12,500	Peace River
*Project information valid as of January 2012. Public sources used.		

Projects Operating – In-situ (3)

In-situ	Bitumen Capacity (bpd)	Region
Orion phase 1	10,000	Cold Lake
Red Earth pilot	1,000	Peace River
Kai Kos Dehseh leismer demonstration	18,750	Athabasca South
MacKay River Phase 1	33,000	Athabasca North
Firebag Phase 1	35,000	Athabasca North
Firebag Phase 2	35,000	Athabasca North
Firebag Cogeneration and Expansion	25,000	Athabasca North
Firebag Phase 3	62,500	Athabasca North
Harper Carbonate Pilot	1,000	Athabasca North
Total:	932,650	

Projects Under Construction – In-situ

In-situ	Bitumen Capacity (bpd)	Region
Kirby (South) phase 1	45,000	Athabasca South
Christina Lake phase D	40,000	Athabasca South
Foster Creek phase F	35,000	Athabasca South
Surmont Phase 2	109,000	Athabasca South
Algar Lake phase 1	5,650	Athabasca South
BlackGold phase 1	10,000	Athabasca South
Sunrise Phase 1	60,000	Athabasca North
McMullen air injection pilot experimental	755	Athabasca South
Germain phase 1 commercial demonstration	5,000	Athabasca South
Christina lake phase 2B	35,000	Athabasca South
STP McKay Project phase 1	12,000	Athabasca North
Firebag Phase 4	62,500	Athabasca North
Total	419,905	

Projects With Regulatory Approval – In-situ

In-situ	Bitumen Capacity (bpd)	Region
Clearwater west pilot	4,350	Athabasca South
Sawn Lake SAGD demonstration	1,400	Peace River
Hangingstone east halfway creek exploratory program	10,000	Athabasca South
Christina Lake phase E	40,000	Athabasca South
Christina Lake phase F	40,000	Athabasca South
Christina Lake phase G	40,000	Athabasca South
Foster Creek phase G	35,000	Athabasca South
Foster Creek phase H	35,000	Athabasca South
Jackfish phase 3	35,000	Athabasca South
Sunrise Phase 2	50,000	Athabasca North
Sunrise Phase 3	50,000	Athabasca North
Sunrise Phase 4	50,000	Athabasca North
Caribou demonstration	10,000	Cold Lake
Cold Lake phase 1-12	30,000	Cold Lake
Long Lake South (Kinosis) Phase 1	40,000	Athabasca South
Long Lake South (Kinosis) Phase 2	40,000	Athabasca South

Projects With Regulatory Approval – In-situ

In-situ	Bitumen Capacity (bpd)	Region
Long Lake phase 2	72,000	Athabasca South
Swan Lake CSS pilot	700	Peace River
Lindbergh pilot	1,200	Cold Lake
Dawson THAI demonstration experimental	TBD	Peace River
Orion phase 2	10,000	Cold Lake
Firebage Phase 5	62,500	Athabasca North
Firebage Phase 6	62,500	Athabasca North
Meadow Creek phase 1	40,000	Athabasca South
Meadow Creek Phase 2	40,000	Athabasca South
Terre de Grace Pilot	10,000	Athabasca North
Total:	809,650	

Projects Under Regulatory Review – In-situ (1)

In-situ	Bitumen Capacity (bpd)	Region
Expansion	24,000	Athabasca South
Dover phase 1	50,000	Athabasca North
Dover subsequent phases	200,000	Athabasca North
Mackay river phase 1	35,000	Athabasca North
Mackay river phase 2	40,000	Athabasca North
Mackay river phase 3	40,000	Athabasca North
Mackay river phase 4	35,000	Athabasca North
Poplar creek phase 1	10,000	Athabasca North
Algar Lake phase 2	5,650	Athabasca South
BlackGold phase 2	20,000	Athabasca South
Tamarack phase 1	20,000	Athabasca North
Tamarack phase 2	20,000	Athabasca North
Hangingstone expansion	35,000	Athabasca South
Gemini commercial	10,000	Cold Lake
Gemini pilot	1,200	Cold Lake
Germain phase 2	30,000	Athabasca South

Projects Under Regulatory Review – In-situ (2)

Germain phase 3	Athabasca South	60,000	60,000
Germain phase 4	Athabasca South	60,000	60,000
Saleski phase 1	Athabasca South	10,700	10,700
Christina lake phase 3A	Athabasca South	50,000	50,000
Christina lake phase 3B	Athabasca South	50,000	50,000
Christina lake phase 3C	Athabasca South	50,000	50,000
Lewis pilot	Athabasca North	1,720	1,720
Taiga phase 1	Cold Lake	17,500	17,500
Taiga phase 2	Cold Lake	17,500	17,500
May River Phase 1	Athabasca South	10,000	10,000
STP McKay Project phase 2A	Athabasca North	12,000	12,000
STP McKay Project phase 2B	Athabasca North	12,000	12,000
Kai Kos Dehseh corner	Athabasca South	40,000	40,000

Projects Under Regulatory Review – In-situ (3)

In-situ	Bitumen Capacity (bpd)	Region
Kai Kos Dehseh - corner expansion	40,000	Athabasca South
Kai Kos Dehseh hanging stone	20,000	Athabasca South
Kai Kos Dehseh Leismer	20,000	Athabasca South
Kai Kos Dehseh expansion	20,000	Athabasca South
Northwest Leismer	20,000	Athabasca South
South Leismer	20,000	Athabasca South
Kai Kos Dehseh Thornbury	40,000	Athabasca South
Kai Kos Dehseh thornbury expansion	20,000	Athabasca South
MacKay River MR2	40,000	Athabasca North
Firebag stages 3-6 Debottlenecking	23,000	Athabasca North
Lewis Phase 2	40,000	Athabasca North
Legend Lake Phase 1	10,000	Athabasca North
West Ells Phase 1	5,000	Athabasca North
West Ells Phase 2	5,000	Athabasca North
West Ells Phase 3	40,000	Athabasca North
West Ells Phase 4	40,000	Athabasca North
Thickwood Phase 1	10,000	Athabasca North

Projects Under Regulatory Review – In-situ (4)

Tristar pilot	1,000	Athabasca South
Dover west leduc carbonates phase 1 demonstration	6,000	Athabasca North
Dover west leduc carbonates phase 1 demonstration	6,000	Athabasca North
Hangingstone phase 1	12,000	Athabasca South
Hangingstone pilot experimental combustion pilot	1,000	Athabasca South
Kirby (North) phase 1	50,000	Athabasca South
Telephone Lake Borealis phase A	35,000	Athabasca North
Grand Rapids phase A	60,000	Athabasca South
Narrows Lake phase 1	43,333	Athabasca South
Narrows Lake phase 2	43,333	Athabasca South
Narrows Lake phase 3	43,334	Athabasca South
Total	1,681,270	

Projects Announced/Disclosed – In-situ (1)

In-situ	Bitumen Capacity (bpd)	Region
Clearwater west phase 2	25,000	Athabasca South
Birch mountain phase 1	60,000	Athabasca North
Birch mountain phase 2	60,000	Athabasca North
Gregoire lake phase 1	60,000	Athabasca South
Grouse commercial	40,000	Athabasca South
Kirby (North) phase 2	30,000	Athabasca South
Kirby (South) phase 2	15,000	Athabasca South
Leismer commercial	30,000	Athabasca South
Telephone Lake Borealis phase B	15,000	Athabasca North
Christina Lake phase H	40,000	Athabasca South
Foster Creek phase I	45,000	Athabasca South
Grand Rapids phase B	60,000	Athabasca South
Grand Rapids phase C	60,000	Athabasca South
Pike 1A	35,000	Athabasca South
Pike 1B	35,000	Athabasca South

Projects Announced/Disclosed – In-situ (2)

In-situ	Bitumen Capacity (bpd)	Region
Pike 1C	35,000	Athabasca South
Birchwood pilot	12,000	Athabasca North
Surmont phase 1	50,000	Athabasca South
Surmont phase 2	50,000	Athabasca South
Dover demonstration plant	500	Athabasca South
Long Lake phase 4	72,000	Athabasca South
Lindbergh commercial	12,000	Cold Lake
Hoole commercial	35,000	Athabasca South
Dawson phase 2	10,000	Peace River
Carmon Creek phase 1	40,000	Peace River
Carmon Creek phase 2	40,000	Peace River
Red Earth commercial	10,000	Peace River
Red Earth pilot expansion	3,000	Peace River

Projects Announced/Disclosed – In-situ (3)

In-situ	Bitumen Capacity (bpd)	Region
Chard phase 1	40,000	Athabasca South
Legend Lake Phase 2	10,000	Athabasca North
Legend Lake Phase 2 Expansion	10,000	Athabasca North
Legend Lake Phase 3	20,000	Athabasca North
Legend Lake Phase 3 Expansion	10,000	Athabasca North
Thickwood Phase 2	20,000	Athabasca North
Thickwood Phase 2 Expansion	20,000	Athabasca North
Terre de Grace pilot phase 1	40,000	Athabasca North
Terre de Grace pilot phase 2	40,000	Athabasca North
Dover west clastics phase 2	35,000	Athabasca North
Dover west clastics phase 3	35,000	Athabasca North

Projects Announced/Disclosed – In-situ (4)

In-situ	Bitumen Capacity (bpd)	Region
Hangingstone phase 2	25,000	Athabasca South
Hangingstone phase 3	25,000	Athabasca South
BlackPearl Resources Inc. blackrod commercial	80,000	Athabasca South
Total	1,389,500	

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.

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