

ALBERTA'S INDUSTRIAL HEARTLAND

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**RAIL SAFETY CONFERENCE
OCTOBER 23, 2018**

ALBERTA'S INDUSTRIAL HEARTLAND ASSOCIATION



Alberta's Industrial Heartland is guided by a non profit association of municipalities dedicated to sustainable eco-industrial development.

Alberta's Industrial Heartland Association is a collaborative 20-year partnership of five municipalities and three associate members.



WHAT WE DO

Investment Attraction

- Business Case Development
- Investor Outreach
- Investor Assistance & Hosting

Planning for Development

- Transportation
- Pipeline Corridors
- Land Use

Government Advocacy & Education

- Provincial Government
- Federal Government
- Municipal Government

Community Engagement

- Education & Information
- Social Awareness
- Community Outreach

ALBERTA'S INDUSTRIAL HEARTLAND

582 sq.km



We are Canada's **largest** hydrocarbon processing centre



\$40 billion in existing **Investment**

Jobs



6,000+ direct
25,000+ indirect



Local Spending
\$1.5 billion Annually



40+ Industrial Heartland companies

RECENT INVESTMENTS

HEARTLAND PETROCHEMICAL COMPLEX

- Propane-to-polypropylene facility
- First of its kind in Canada
- Construction has begun and is targeted for completion end of 2021



- \$4.1 Billion capital investment
- 13,000 direct and indirect jobs during construction
- 180 direct full-time permanent jobs



RECENT INVESTMENTS

STURGEON REFINERY

- First refinery built in Canada since 1984
- World's first refinery designed with integrated carbon capture
- Direct conversion bitumen to ultra-low sulphur diesel



- \$9.7 Billion capital investment
- 7,000 workers on site at peak
- 500 Full-time permanent jobs
- Partnership with Pembina for diesel logistics services



RECENT INVESTMENTS

ALBERTA MIDLAND RAILWAY TERMINAL

- Rail logistics centre strategically located in AIH on CN's secondary Mainline between Winnipeg and Edmonton
- Transload options for dry commodities, industrial products, and over dimensional shipments.



- \$34 million capital investment
- Phase I operational in November 2017
- Storage capacity up to 850 cars

RECENT INVESTMENTS

PEMBINA RFS EXPANSION

- Phase III expansion was successfully put into service in mid-2017
- The entire Phase III program includes over 900 km of new pipeline primarily along the Company's existing Peace and Northern system rights-of-way, as well as upgrading and adding new mainline pump stations



- \$2.44 billion capital project since 2013
- RFS III added 55,000 bpd of additional propane-plus fractionation capacity. Pembina's Redwater complex now has an aggregate fractionation capacity of 210,000 bpd – the largest in the Canadian energy infrastructure sector.

NEW DEVELOPMENTS

- Canada Kuwait Petrochemical Corporation (joint venture between Pembina Pipelines and Petrochemical Industries Company) proposing to construct a propane dehydrogenation (PDH) plant, a polypropylene (PP) plant, a cogeneration unit and a rail yard (the Complex).
 - \$4 billion capital investment
 - Currently in Front End Engineering and Design, expected to be completed by end of Q4 2018
 - FID will follow completion of FEED
 - If positive FID, completion slated for Q2 2023

NEW DEVELOPMENTS

- Corporate merger between Agrium and Potash Corp, creating “Nutrien”, the largest fertilizer company in the world
 - Post-acquisition operational optimization resulting in Nutrien’s Redwater facility phasing out production of its ammonium phosphate (MAP) fertilizer
 - The ammonium phosphate production assets will be converted to ammonium sulphate production

- SinoCan Global announced plans for a world-scale bitumen refinery in the Industrial Heartland
 - Joint venture between subsidiaries of SINOPEC, China Construction, Middle East Gulf Chemical Co., Teedrum Inc., and the Alberta First Nations Energy Centre LP (AFNEC)
 - Design capacity of 167,000 barrels of bitumen per day

THE HORIZON OF OPPORTUNITY



There is a petrochemical investment window open right now for North America.

There is the potential to attract **\$30 Billion in NEW Capital Investments** to Alberta's Industrial Heartland by 2030 under the Right Investment Conditions



INVESTMENT POTENTIAL

- Methanol
- Fertilizers
- Ethylene/polyethylene
- PDH/Polypropylene
- Speciality chemicals
- Bitumen Upgrading/Refining
- Bitumen Partial Upgrading

THANK YOU

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www.IndustrialHeartland.com