

The Edmonton Metro's proximity to Alberta's oil reserves — the 3rd largest oil reserve in the world — has led to global investment and world-renowned innovation in the energy sector.



- Large pool of skilled technical talent
- Access to low cost reserves
- Robust, supporting infrastructure
- Access to global markets

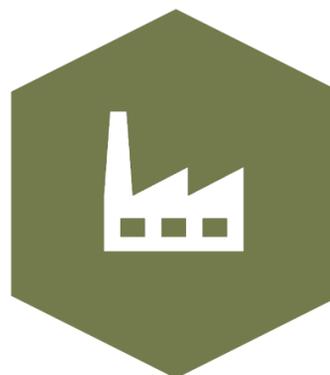
EDMONTON REGION: POWERING THE GLOBAL ECONOMY

Edmonton Region is Alberta's logistical and service hub for the energy sector, supported by a large skilled workforce, and extensive federal and provincial support



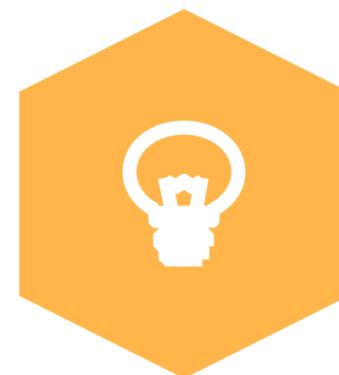
MINERAL EXTRACTION

- In 2018, Alberta contributed 82% of all oil sand production in Canada
- Alberta accounts for greater than 50% of Canada's GDP in the mineral extraction sector



MANUFACTURING

- Alberta's Industrial Heartland, in the Edmonton Region, is Canada's largest hydrocarbon processing cluster, with over 40 national and multinational companies, \$40 billion in operating investment and 43% of Canada's basic chemical manufacturing



DISTRIBUTION

- Key pipeline infrastructure allows for connection and access to a 373,000km regional network. Other key assets include North West Refining and the concentration of oil refineries in Refinery Row

ENERGY HIGHLIGHTS



\$84b

Annual exports from Alberta



32,905

Workers in Edmonton Region



5,183

Establishments in Alberta

\$799m

SPENT ON R&D

Over \$799m was spent by governments in Canada on energy R&D in 2017-18

51
COUNTRIES

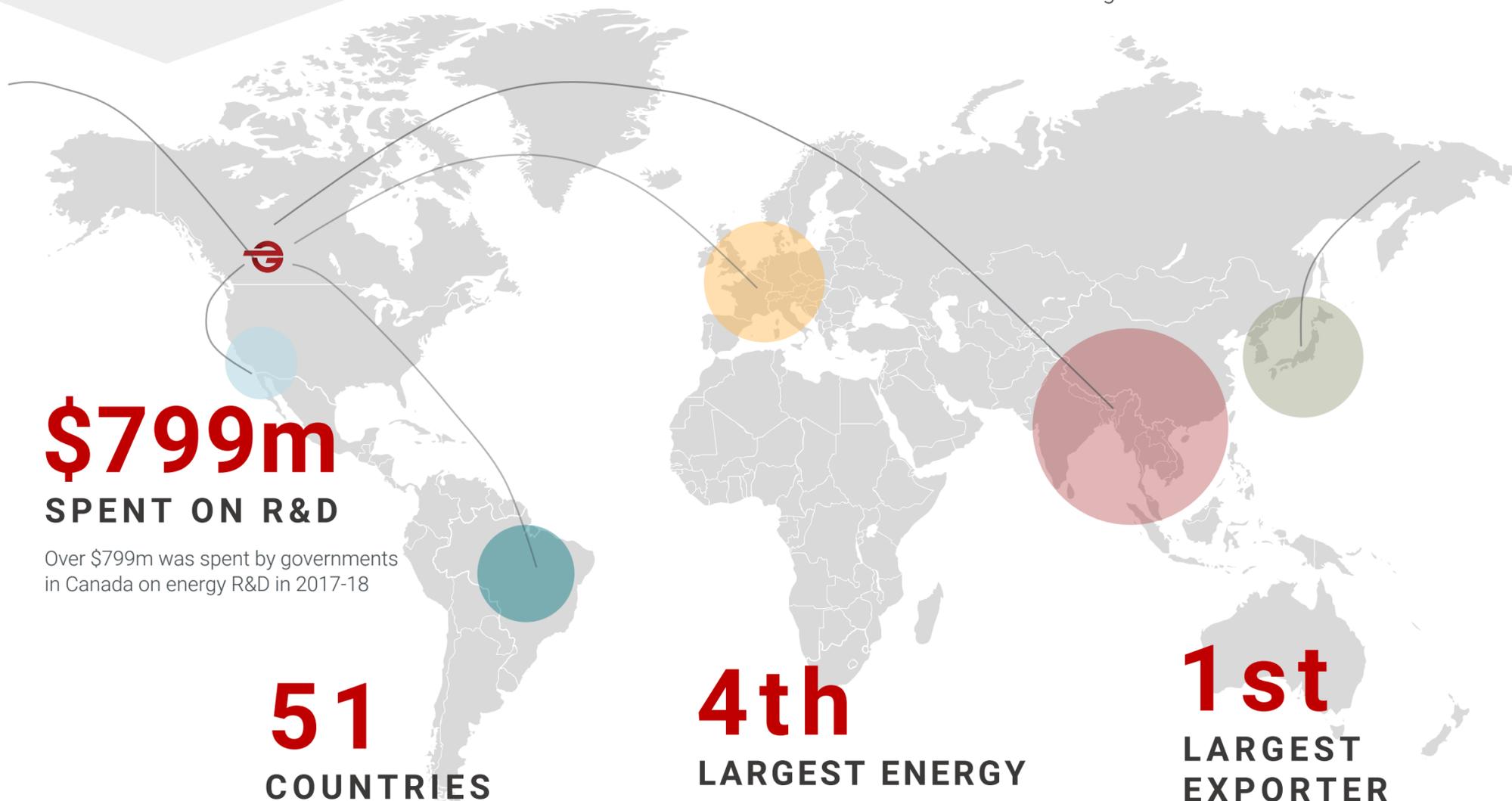
Preferred market access to 51 countries, representing approximately 1.5 billion consumers and over 67 per cent of global GDP

4th
LARGEST ENERGY EXPORTER

In 2018, Canada was the fourth largest exporter of energy

1st
LARGEST EXPORTER

Canada is the largest foreign supplier of crude oil to the US, making up 48% of total US crude imports



UNIVERSITY OF ALBERTA
FUTURE ENERGY SYSTEMS

\$75m INVESTMENT
1400+ PUBLICATIONS AND AWARDS

TALENT & EDUCATION

UNIVERSITY OF ALBERTA

- Stands out for its research expertise and offers extensive programming related to the energy sector including in Engineering (Mining, Petroleum, Chemical, etc.), Environmental and Conservation Sciences, Geology, etc.
- Hosts the Institute of Oil Sands Innovation which supports discovery and innovation across a broad range of areas in oil sand mining and upgrading

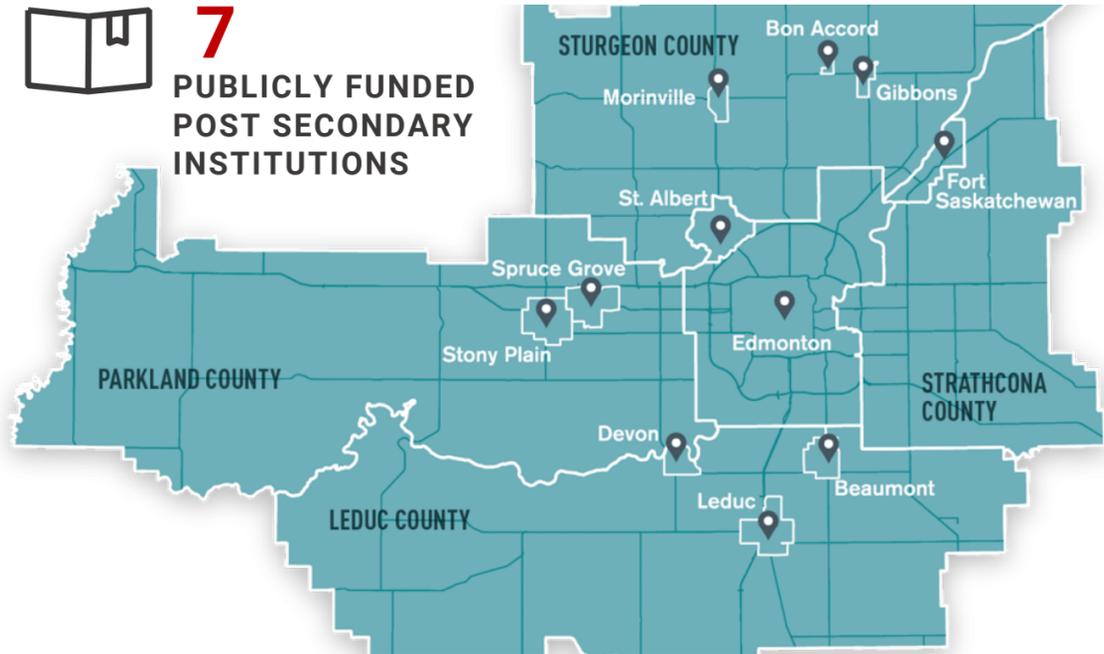
FUTURE ENERGY SYSTEMS

- Develops energy technologies of the future, integrates them into today's infrastructure, and explores economic, environmental, and social impacts

Alberta's Industrial Heartland
Celebrating 20 Years **\$40b** IN CAPITAL INVESTMENT



7
PUBLICLY FUNDED POST SECONDARY INSTITUTIONS



INNOVATION ECOSYSTEM

RESEARCH & DEVELOPMENT

- In 2017-18, federal spending on R&D increased by 14% (\$67m) boosted by increased energy efficiency and hydrocarbon spending including increases in carbon capture, utilization and storage

SHELL CANADA ENERGY QUEST PROJECT

- World's first commercial-scale carbon capture & storage (CCS) project to tackle carbon emissions related to oil sands operations
- Safely stores more than 1 million tonnes of CO₂ emissions annually



\$11.2b

LESS TAXES PAID BY BUSINESSES THAN IN OTHER CANADIAN JURISDICTIONS

BUSINESS ENVIRONMENT

COMPETITIVE TAX REGIME

- At 11%, Alberta currently has the lowest corporate tax rate in Canada. The province's tax rate is set to be further reduced to 8% by 2022
- The value added tax (VAT) in Alberta is 5%, among the lowest rates across all of Canada

Alberta's Industrial Heartland, located in the Edmonton Metro Region, is a concentration of world-class refining and processing operations. It is the largest hydrocarbon processing cluster in Canada and the center of petrochemical activity in Western Canada.

More than **40 national and multinational companies** operate in Alberta's Industrial Heartland, representing over **\$40 billion** in current capital investment. These operations are dynamic, innovative, and leading the way to a greener future.



EDMONTONGLOBAL.CA



info@edmontonglobal.ca

1-800-264-4952

/company/Edmonton-Global

@EdmontonGlobal

Suite 100 – 100200 100 St. NW – T5J 0N5 Edmonton, Alberta, Canada