



**Pathways
Alliance**



North American energy security

There is a vital need to ensure greater security and stability for the world's energy supply. It's important that energy demand is met by stable, democratic countries that are committed to environmental performance, regulatory standards, health and safety, and gainful employment.

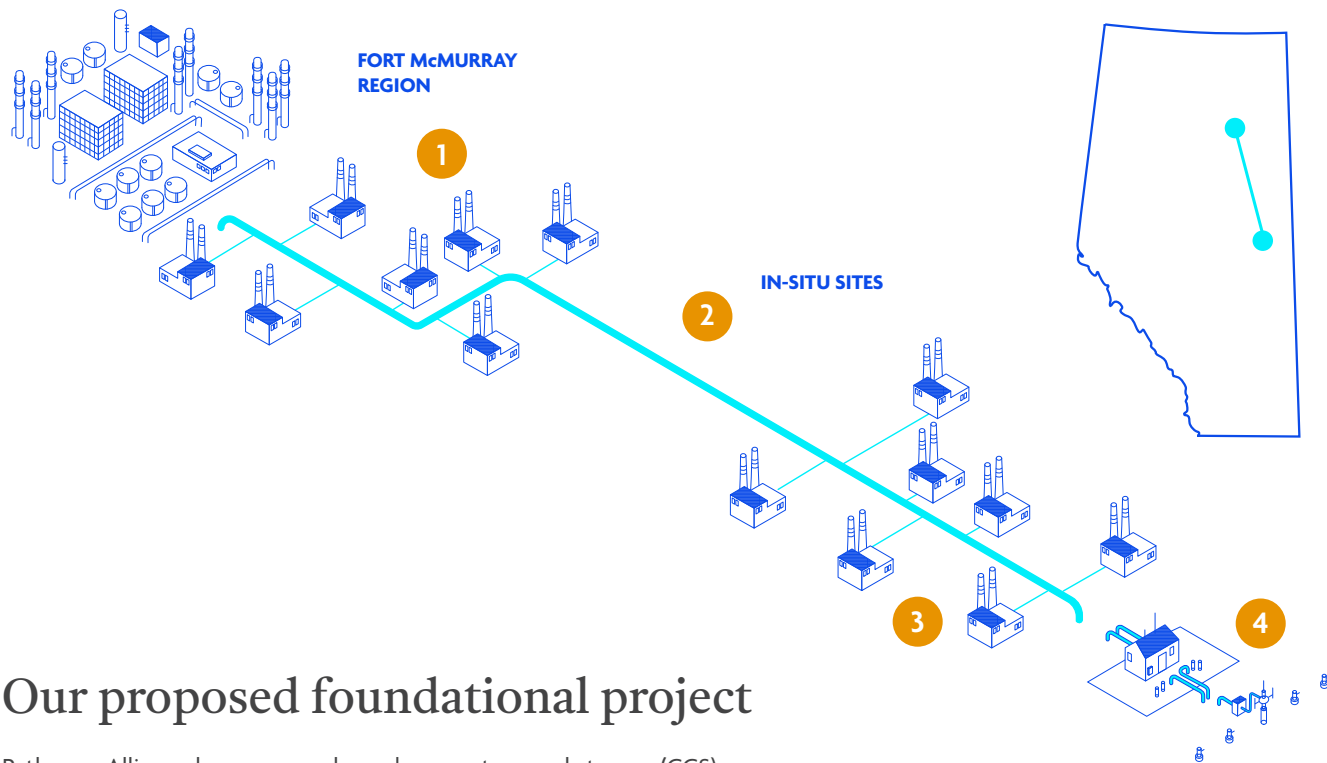
About us

Pathways Alliance is a collaboration between Canada's six largest oil sands companies. We're working together on advancing environmental innovation and projects.

With its vast oil and gas resources and strong track record for innovation, Canada has an opportunity, through the Pathways Alliance members, to help support North American energy security.

**Pathways Alliance represents
Canada's largest oil sands producers.**







Our proposed foundational project

Pathways Alliance has proposed a carbon capture and storage (CCS) network and pipeline that, when operational, will have the capacity to transport captured CO₂ from multiple oil sands facilities to a hub in the Cold Lake area of Alberta for permanent underground storage. The line could be made available to other oil producers and industries in the region interested in capturing CO₂ emissions. We're working with government to secure the appropriate fiscal support and regulatory approvals that will be necessary to make this project a reality.

Engineers and technical experts from Pathways Alliance companies are advancing engineering and environmental work for the project application, refining carbon capture technology and engaging Indigenous and other local communities along the proposed pipeline route.

- 1 Oil sands upgraders, mining and in-situ area
 - 2 400+ km CO₂ transportation line
 - 3 Oil sands in-situ recovery area
 - 4 Joint carbon storage hub
-  Emission source
-  CO₂ transport line

Part of the solution

Global organizations such as the International Energy Agency and the United Nations Intergovernmental Panel on Climate Change have clearly stated that widespread CCS must be part of the solution to mitigate climate change. Our industry has shown leadership in implementing technologies that have led to commercial-scale emission-reduction projects in Canada and around the world.





Canada has 163 billion barrels of oil that can be recovered economically with today's technology.¹ Of that, 159 billion barrels are in the oil sands.²

Photo: Christina Lake Project, MEG Energy

Canada's oil sands by the numbers

4th largest¹

Canada has the fourth-largest oil reserves in the world.

97% of Canada's oil resources are located in the oil sands.

60%¹

In 2022, Canada was the source of 60% of crude oil imported into the U.S.

Canada has long been the number one supplier of imported oil to the U.S. and is a significant and increasingly critical source of heavy oil feedstock for Gulf Coast and Midwest refineries.

159 billion²

Canada's oil sands have 159 billion recoverable barrels.

The Canada Energy Regulator reports **4.9 million** barrels per day were produced in 2023.³

Currently, 80% of recoverable reserves will need to be extracted by drilling (in situ), while 20% are recoverable by mining.

¹ *Energy Fact Book 2024–2025*, Natural Resources Canada, 2024.

² "Crude Oil Industry Overview," Natural Resources Canada.

³ "Estimated Production of Canadian Crude Oil and Equivalent," Canada Energy Regulator, 2024.



As Canada's oil sands industry works to help meet global energy demand, it is also accelerating environmental innovation.

COSIA

Canada's Oil Sands Innovation Alliance (COSIA) is the innovation arm of Pathways Alliance. Since 2012, COSIA has been focused on collaborative action and innovation in oil sands environmental technology.

COSIA brings together academics, researchers, innovators and others to collaborate on solutions with the potential to produce incremental or big improvements in four priority areas: tailings, water, land and greenhouse gases.



Learn more at PathwaysAlliance.ca or reach us at contact@pathwaysalliance.ca.