



canadian
energy
pipeline
association

association
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d'énergie

ENERGY INFRASTRUCTURE IS ESSENTIAL TO CANADA

IAGT SYMPOSIUM 2017

Chris Bloomer, President & CEO, CEPA
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Who is CEPA?

The **Canadian Energy Pipeline Association** (CEPA) represents Canada's transmission pipeline companies, which operate about 135,000 kilometres of pipeline in Canada and the United States.

VISION

- Safe, socially and environmentally-sustainable industry

MISSION

- Enhance operating excellence, business environment and recognized responsibility of industry
- Leadership and credible engagement between member companies, governments, the public and stakeholders

CEPA's role



CREDIBLE



LEADERSHIP



EXPERTISE



COLLABORATIVE



TRANSPARENT



STAKEHOLDER
ENGAGEMENT

CEPA members



- Access Pipeline Inc.
- Alliance Pipeline Ltd.
- ATCO Pipelines
- Enbridge Pipelines Inc.
- Inter Pipeline Ltd.
- Kinder Morgan Canada Inc.
- Pembina Pipeline Corporation
- Plains Midstream Canada
- TransCanada Pipelines Limited
- TransGas Limited
- Trans-Northern Pipelines Inc.

Transmission pipeline industry vitals



Over 60 years in
Canada



Highly regulated
industry

97%

Transports 97% of the natural
gas and onshore crude oil
produced in Canada

~135,000km



~135,000 kilometres of
pipeline in Canada and
the U.S.



Safe and
environmentally sound

Contributing to Canada

\$11.5B Canada's economy (2015)

\$7.9B capital projects

13,646
full-time jobs

\$1.5B
gov. tax
revenues

\$31.1M
community
initiatives

\$22.8M
innovative
technology

Is energy infrastructure important?

It's a rhetorical question

It's important now

It will be important in the near-term

It will continue to be important in the long-term

CEPA member pipeline network

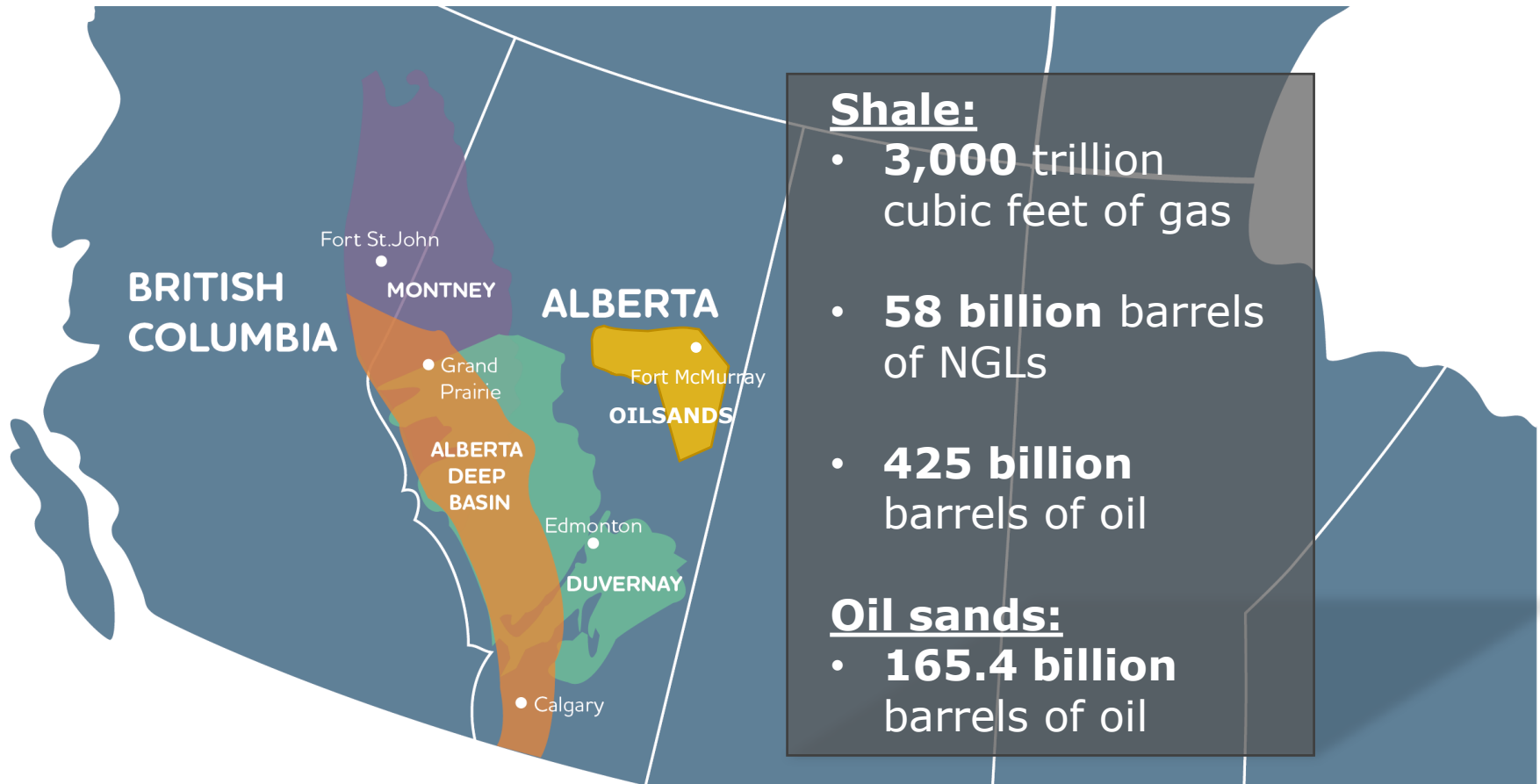
- Gas pipeline
- Oil pipeline



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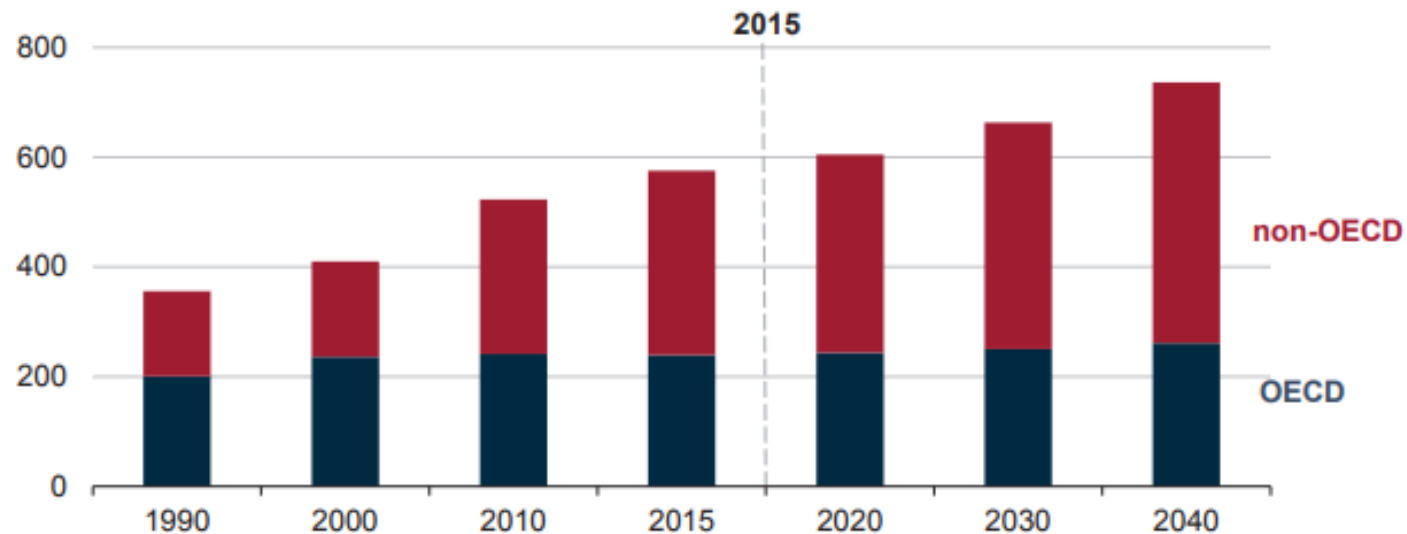
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Western Canadian supply



Global demand

World energy consumption
quadrillion Btu



U.S. Energy Information Administration

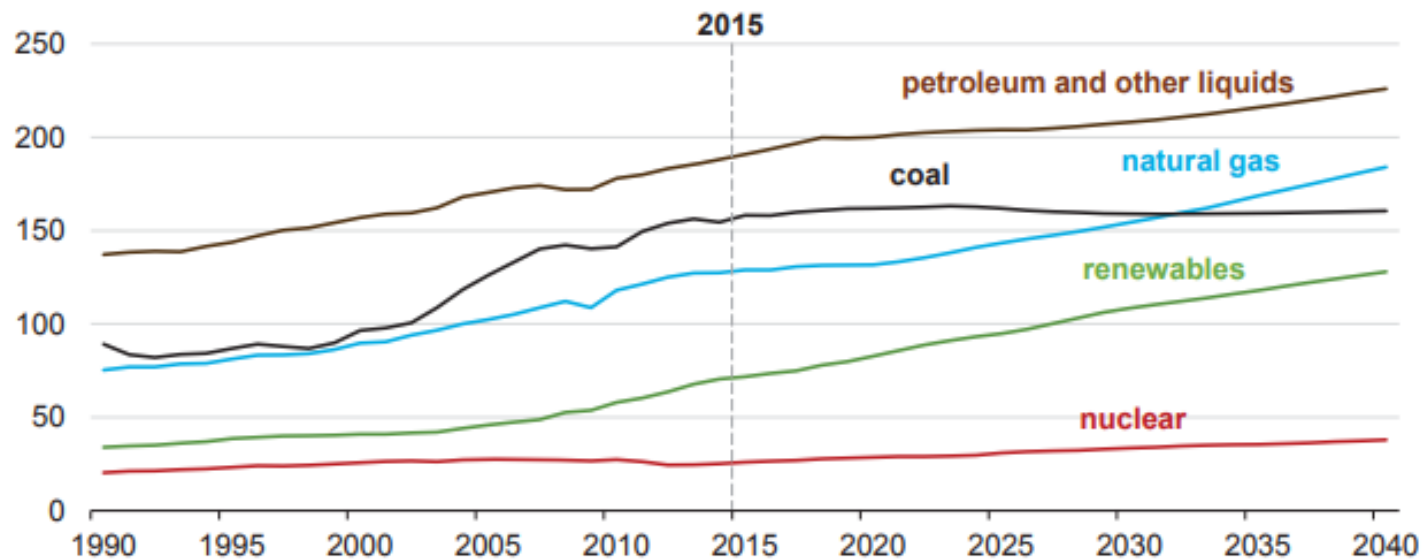
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World energy consumption

World energy consumption by energy source
quadrillion Btu



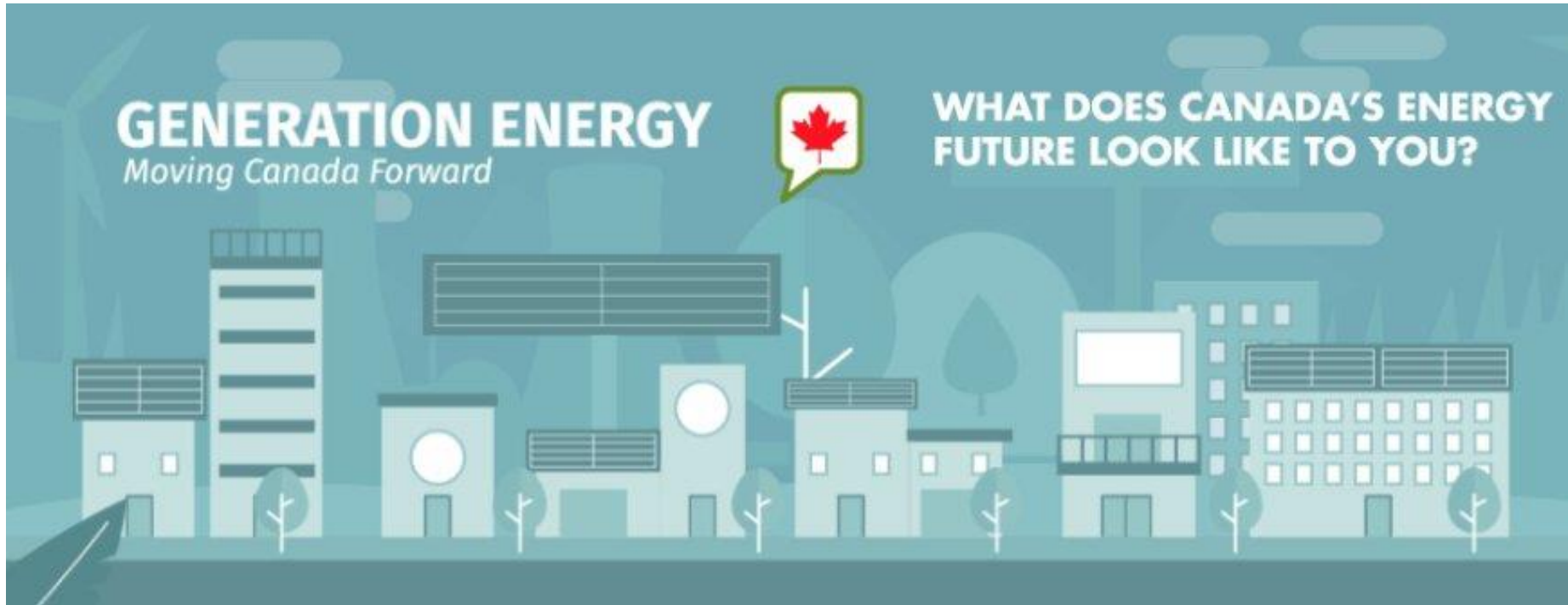
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Energy transition





DIGGING TRENCH FOR GAS PIPE, GARLSTADT, ALTA. ★
COFFEY. PHOTO







WE ARE

PROJECT OVERVIEW AND PROPOSED SCHEDULE

OUR BUSIN



JUST

ased Pembina
and responsi
ne integrated
ong each st

kilometre
diluent
Canada,
mark

WHERE WE OPERATE

- Gas Processing Plant
- Refinery
- Midstream Storage Facility
- Truck Terminal
- Rail Terminal
- Midstream Operations
- Other Pipeline Facilities
- Other Pipeline Facilities



WELL CONNE

Conventional Pipelines

- Approximately 8,300 kilometre pipeline network that extends across British Columbia
- Provides reliable, cost-effective service to customers in the oil and natural gas sectors of both provinces
- Transports approximately half of Alberta's conventional crude oil production
- Transports about 30 percent of NGLs produced in Western Canada

Oil Sands & Heavy Oil

- Transports crude oil from Syncrude Canada Ltd., and Canadian Natural Limited operations near Fort McMurray, AB to markets near Edmonton, AB
- Provides support to oil sands producers operating southwest of Fort McMurray in the Athabasca River heavy oil region of Alberta
- Approximately 1,650 kilometres of oil sands pipeline infrastructure that provides take-away capacity from the Athabasca Oil Sands



COVERING THE SPREAD

Midstream

- Wholly-owned terminals, storage facilities and hub services for pipeline systems
- A terminal with storage facilities strategically located in the Edmonton area to aggregate and deliver products on behalf of our customers
- A 73,000 bopd fractionator at Redwater, AB which is being expanded
- Wholly-owned storage facility in Corunna, ON
- A 16.5 percent ownership of the fractionator in the Samia, ON
- A 2.4 bopd in NGL extraction capacity

Industry challenges

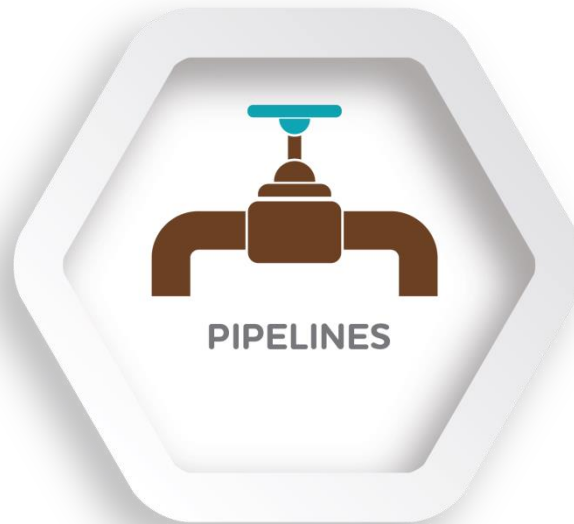
Regulatory reform

Security

Indigenous relations

Climate change

Spills & releases



Broad policy shifts

Pipeline capacity constraints

Increased stakeholder activism

Lack of understanding of the industry

Investment uncertainty

Safety performance

Safe Delivery

99.999%

0 Significant liquids incidents

1 Significant natural gas incident

Number of incidents versus significant incidents
CEPA members 2012-2016



Getting to zero incidents

ACCOUNTABILITY, PERFORMANCE AND EXECUTION



Leadership and governance

CEPA Integrity First®

management systems and operating practices

Safety culture

Technology and innovation

Summary

We **MATTER**

- * Economic driver
- * Vast network
- * Reliable

We **CONTRIBUTE**

- * Billions to the economy
- * Millions to communities
- * Thousands of jobs

We **EVOLVE**

- * Working with gov. on policies
- * Investing in renewables
- * Innovation

We are **SAFE**

- * 99.999% record
- * Goal of zero incidents
- * Safest mode of transportation



Trust us to deliver Canada's energy,
safely and responsibly.