



Expansion of existing oil sands and upgrading facilities drives industry growth:

More than \$15 billion in MRO spending means long-term opportunity for suppliers

In response to the global credit crunch and economic downturn, a number of anticipated Alberta-based oil sands upgraders and petrochemicals projects were deferred or delayed by the project owners. Almost none of these projects were beyond the initial proposal or investment decision, and none had passed the final decision gate for full investment.

Extraction and processing facilities already in the ground are continuing their development and a majority of companies currently in oil sands extraction and upstream processing are announcing expansion of their resource plays. Shell Canada, Imperial Oil, Suncor, and Syncrude are all continuing the expansion of their oil sands extraction facilities.

All oil sands facilities are operating at full capacity, often above capacity, and the maintenance, repair, and operation requirements from these plants is enormous. Annual shutdowns, scheduled overhauls, and facility optimisation are translating into at least \$15 billion per annum in opportunities for suppliers for the mid- to long term.

More information on major capital and construction projects, including MRO shutdowns, is available at www.albertacanada.com/statpub and www.shutdownscanada.com.

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