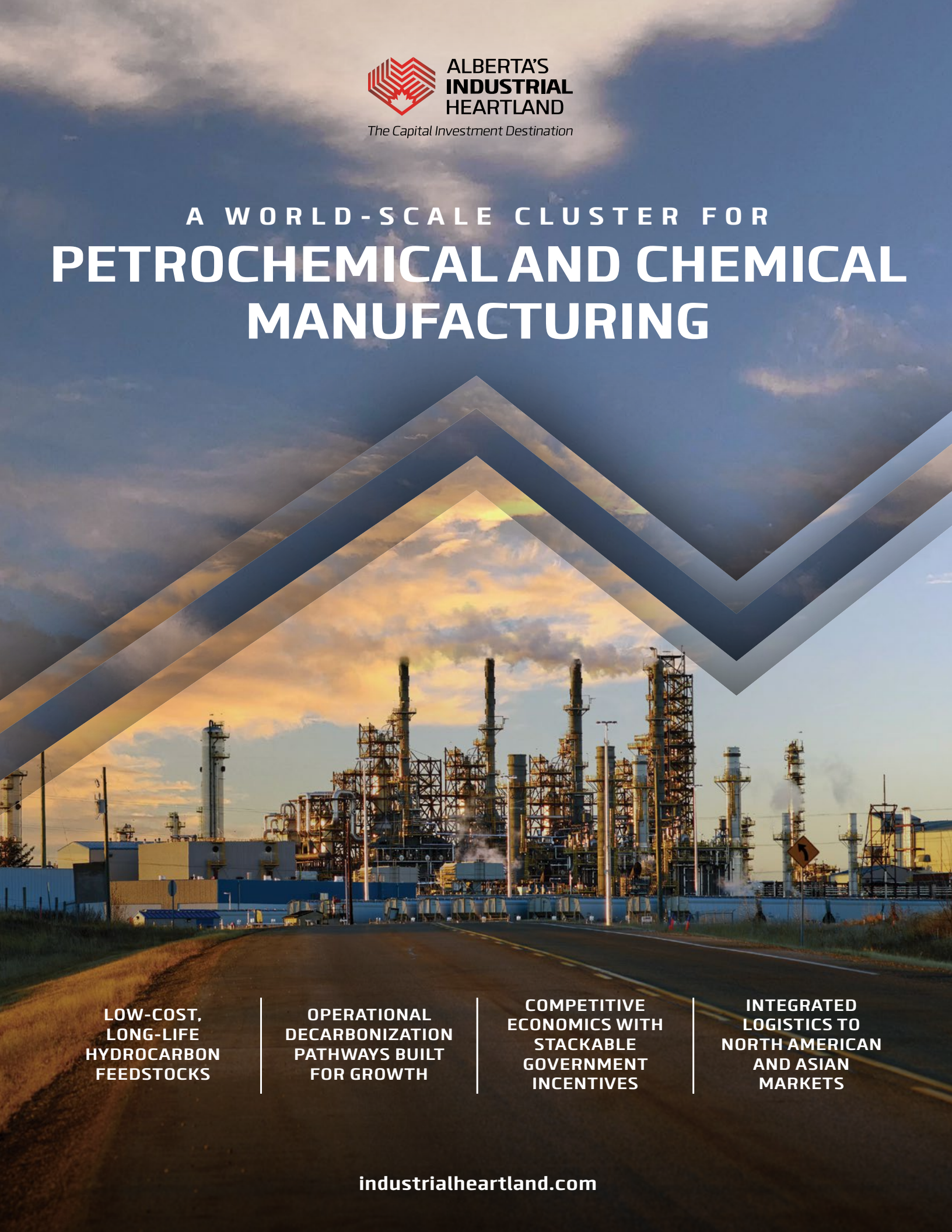
ALBERTA'S INDUSTRIAL HEARTLAND

The Capital Investment Destination

A WORLD-SCALE CLUSTER FOR

PETROCHEMICAL AND CHEMICAL MANUFACTURING



LOW-COST, LONG-LIFE HYDROCARBON FEEDSTOCKS

OPERATIONAL DECARBONIZATION PATHWAYS BUILT FOR GROWTH

COMPETITIVE ECONOMICS WITH STACKABLE GOVERNMENT INCENTIVES

INTEGRATED LOGISTICS TO NORTH AMERICAN AND ASIAN MARKETS

industrialheartland.com

CANADA'S LARGEST HYDROCARBON PROCESSING REGION

Alberta's Industrial Heartland is Canada's largest hydrocarbon processing region and most advanced carbon sequestration hub. With **$50 billion in existing capital investments**, AIH is home to more than 40 companies in a variety of sectors, including fuels, fertilizers, power, petrochemicals, and more. Our region's cluster model provides improved industrial efficiencies and land use, reduces industrial GHG footprint, and promotes increased innovation.

GOOD CHEMISTRY = OPPORTUNITY FOR GROWTH

C1 CHAIN
AMMONIA / FERTILIZER
METHANOL
BLUE HYDROGEN

C2 CHAIN
ETHYLENE
EO / EG
POLYETHYLENE
CHLOR ALKALI / EDC

C3 CHAIN
PROPYLENE
PO / PG
POLYPROPYLENE
SAP

C4 CHAIN
BUTANE
MALEIC ANHYDRIDE
BUTANEDIOL

TOP CHEMICALS FOR INVESTMENT IN THE HEARTLAND

This alphabetical list of chemicals, compiled by OPIS, are the highest value chemicals that can be produced in Alberta's Industrial Heartland.

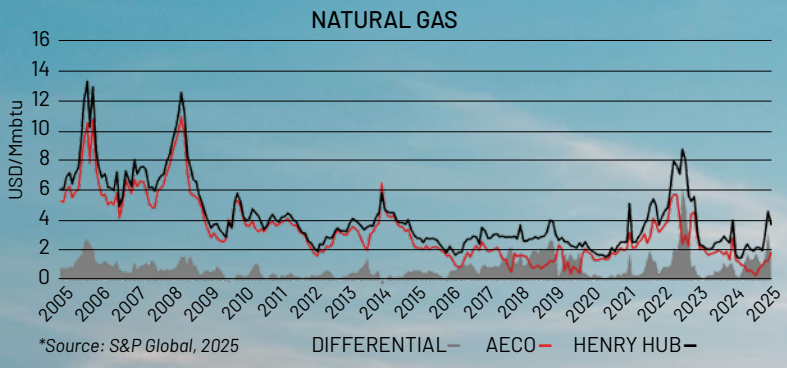
TOP 15 CHEMICALS	COMPLEX CHEMICAL GROUP
Ammonia	Ammonia and/or Ammonia-Urea
Caustic Soda	Chlorine-Caustic (+ Vinyls with Ethylene supply)
Chlorine	Chlorine-Caustic (+ Vinyls with Ethylene supply)
Ethoxylates*	Ethoxylates + PEG with Purified Ethylene Oxide supply
Ethylene	Ethane Cracker + PE + Butene-1 comonomer
High Density Polyethylene	Ethane Cracker + PE + Butene-1 comonomer
Linear Low Density Polyethylene	Ethane Cracker + PE + Butene-1 comonomer
Low Density Polyethylene	Ethane Cracker + PE + Butene-1 comonomer
Methanol	Methanol
Polyethylene Glycol*	Ethoxylates + PEG with Purified Ethylene Oxide supply
Polypropylene	Propylene via PDH or Metathesis + Polypropylene
Propylene	Propylene via PDH or Metathesis + Polypropylene
Urea	Ammonia-Urea
Urea-formaldehyde resins (UF)	Urea-formaldehyde resins (UF)

- Alberta's Industrial Heartland leverages **abundant natural gas and NGL feedstocks**, linking base chemicals with downstream derivatives in integrated complexes. This setup creates **efficiency, scale, and a strong competitive advantage** within the industrial cluster.
- The region also supports import replacement and meets growing North American demand, while its existing pipelines, storage, and current industrial assets make it an ideal hub for investment in high-value chemicals.

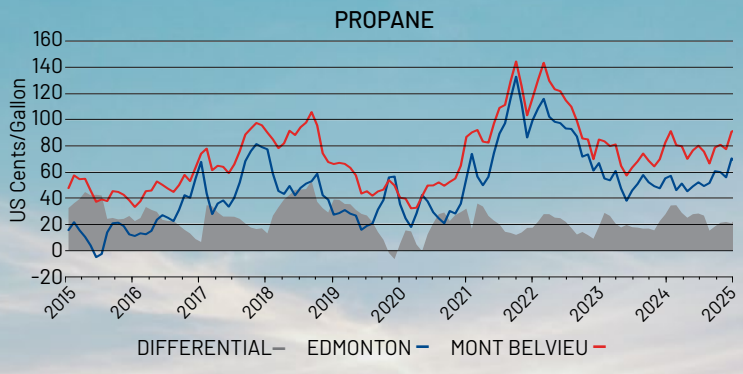
OPIS A DOW JONES COMPANY | CHEMICAL MARKET ANALYTICS

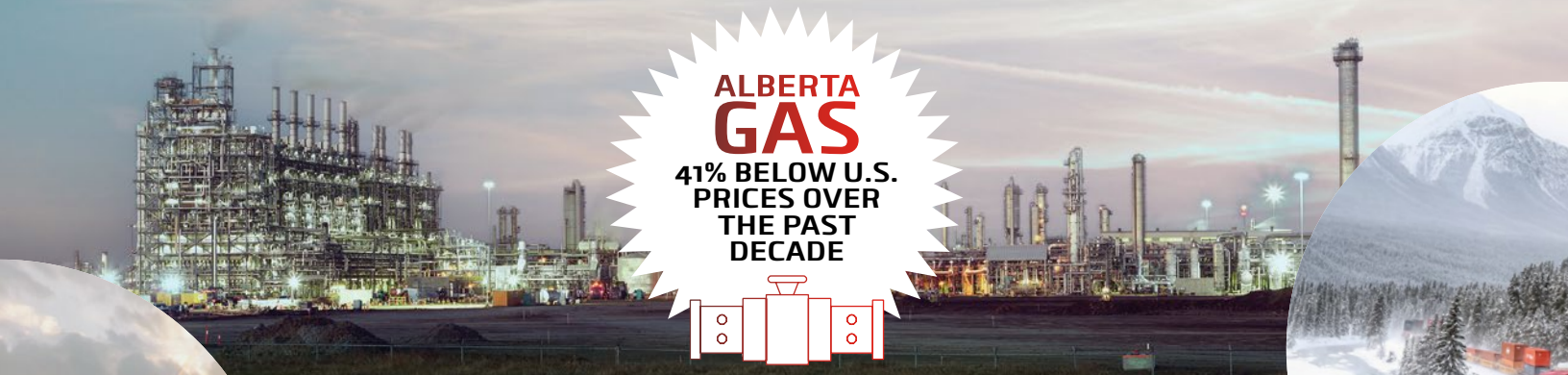
WHY ALBERTA'S INDUSTRIAL HEARTLAND?

COST-ADVANTAGED FEEDSTOCKS



*Source: S&P Global, 2025





ALBERTA GAS

41% BELOW U.S. PRICES OVER THE PAST DECADE

INTEGRATED INFRASTRUCTURE EXCELLENCE

LOW CARBON, FUTURE READY ECOSYSTEM

- CCUS integration for low-cost abatement.
- Hydrogen-ready infrastructure.
- Access to renewable and low carbon power.

LOGISTICS, REGULATORY, AND EXECUTION ADVANTAGE

- 582 km^2 pre-zoned heavy industrial land.
- Direct rail + pipeline connectivity to North America and Asia markets.
- AIH is Canada's only Designated Industrial Zone, which means expedited and streamlined permitting.
- Shared utilities and by product synergies reduce CAPEX and project risk.
- Proximity to logistics, labour, and suppliers.
- Globally competitive construction and operating costs.

STACKABLE **INCENTIVE PROGRAMS**

- Incentive programs available across all levels of government.
- Designed to support business growth, innovation, and sustainability.
- Strengthen competitiveness and accelerate opportunity.
- Help companies stay at the forefront of their industry.

ACCESS TO **WORLD MARKETS**

- AIH sits at the centre of a world-class continental transportation network connecting to global markets.
- Shortest marine shipping route from North America to high-growth east Asian markets, via Canada's west coast.
  - ~50% quicker access than the U.S. Gulf Coast.
  - ~30% faster than operating from the Middle East.
- Extensive highways, pipelines, and rail infrastructure provide distribution access across North America, including to the Gulf region.

OVER $50B IN CAPITAL INVESTMENTS

HOME TO **OVER 40** GLOBALLY SIGNIFICANT INDUSTRIAL OPERATORS

DOW'S USD $7.5B PATH2ZERO PROJECT: PHASE 1 STARTUP IN 2029, PHASE 2 IN 2030

WORLD'S FIRST NET-ZERO CARBON EMISSIONS ETHYLENE AND DERIVATIVES COMPLEX

PROJECT	COMPANY	STATUS	PROJECT HIGHLIGHTS	
HEARTLAND PETROCHEMICAL COMPLEX (HPC)	Inter pipeline	COMPLETE	HPC is Canada's first propane dehydrogenation and polypropylene production facility.	**Project Type:** PDH & PP **Capacity:** 550 KTA
NGL NORTH	WOLF MIDSTREAM	COMPLETE	NGL North is an NGL recovery, transportation, and fractionation system, connecting Northern Alberta to AIH.	**Project Type:** NGL capture, transportation and fractionation **Capacity:** 70 KBbl/d
FORT SASKATCHEWAN EXPANSION	PLAINS MIDSTREAM CANADA	COMPLETE	Plains Midstream Canada sanctioned an expansion of their fractionation facility at Fort Saskatchewan.	**Project Type:** NGL Frac **Capacity:** 30 KBbl/d
RFS IV	PEMBINA	UNDER CONSTRUCTION	Pembina is constructing its fourth fractionator in AIH. The C3+ frac will add 55 kbbl/d, bringing total frac capacity to 256 kbbl/d on site.	**Project Type:** NGL Frac **Capacity:** 55 KBbl/d
PATH2ZERO	DOW	UNDER CONSTRUCTION	Path2Zero is Dow's first net-zero integrated ethane cracking complex which will utilize hydrogen as a clean fuel and third-party CCS.	**Project Type:** Ethylene and derivatives **Capacity:** 1.8 MMTPA

Connect with our team to accelerate your next project.

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