



CLEARING THE BITUMEN BOTTLENECK



**ASSESSING PROCESSING, TRANSPORTATION AND MARKETING
OPTIONS FOR ALBERTA BITUMEN**

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This Multi-Client study focuses on assessing the processing, transportation & marketing options for Alberta Bitumen and evaluates options available to producers based in part on the relative crude values delivered to key refining centers. The study's scope includes blended bitumen, partially upgraded bitumen, fully upgraded bitumen and refined products. Various transportation scenarios for Alberta producers are assessed with the optimum netback analyzed under each selected scenario.

Key Features:

- Current assessment of Alberta oil sands supply, demand and logistics
- Economic analysis of bitumen blending, partial upgrading, full upgrading, and refining in Alberta
- Key refinery disposition markets best configured for each bitumen stream
- Pipeline implications (Enbridge Line 3, TransCanada Keystone XL, Trans Mountain Pipeline Expansion) of future bitumen production and transportation
- Economic assessment of railing bitumen to various markets
- Netback analysis on bitumen exports to the U.S. and Asia including price decks for both crude and refined petroleum products at key locations
- Supply/Disposition analysis to determine how much bitumen, and in which form, can be absorbed by key markets (PADDs I-V and Asia)
- IMO 2020 impact on Alberta bitumen production

Subscription Information and Pricing

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