



Pathways Alliance

Powering Canada's economy

Now's the time, Canada. The oil sands industry is ready to help strengthen our economy when we need it most. Costs are rising, incomes aren't keeping up, and economic uncertainty has families struggling. That's why it's important to keep all sectors of our economy going strong—including our oil sands. Pathways Alliance is made up of Canadian Natural, Cenovus, ConocoPhillips Canada, Imperial and Suncor, representing five of Canada's largest oil sands producers.



Innovating Canada's oil sands

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

COSIA brings together academics, researchers, innovators and others to collaborate on solutions that could produce improvements in four priority areas:



TAILINGS



WATER



LAND



GREENHOUSE GASES

¹ Energy Fact Book 2024-2025, Natural Resources Canada, 2024.

² "Oil and gas extraction revenues, expenses and balance sheet." Statistics Canada, Sept. 25, 2024.

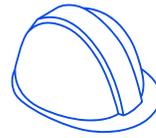
³ Exner-Pirot, Heather and Remillard, Bryan. "One trillion reasons why oilsands benefit Canada's economy." Macdonald-Laurier Institute, Nov. 21, 2024. (2000-2021 data collected through CAPP; 2021-2024 data from public sources.)

⁴ Oil Analysis and Forecast to 2030, International Energy Agency, 2024.

⁵ Agnolucci, Paolo & Makarenko, Nikita. "Growing oil supplies amid moderating demand and geopolitical uncertainty: What lies ahead for oil?" World Bank Blogs, Nov. 5, 2024.

⁶ Energy Fact Book 2024-2025, Natural Resources Canada, 2024.

* This number does not represent profits or dividends. It is the amount of direct spending: capital, operating expenses, taxes and royalties.



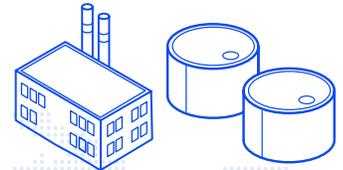
JOB

446,000+

Canadians directly or indirectly employed by the oil and gas industry.¹

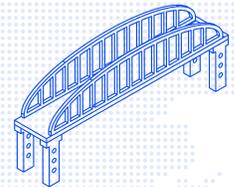
REVENUE

Taxes and royalties for federal and provincial governments paid by the oil and gas industry.



\$123B

2017–2023²



INFRASTRUCTURE & PROGRAMS

Funds paid by the oil and gas industry to build Canadian roads, bridges, schools and more.



\$1 trillion*

Contributed to Canada's economy over the past 25 years by the oil sands.³

THE WORLD NEEDS SECURE ENERGY

Global consumption of oil is just over

100M

barrels per day⁴

Global middle class is growing by

100M

people per year⁵



With the

4th largest

oil reserves in the world, Canada has an important role to play.⁶