

# Liquids Pipelines



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# Liquids Pipelines Asset Footprint



## Liquids Pipelines

### Enbridge Inc.

- Canadian Mainline
- NW System
- Athabasca System
- Mustang Pipeline
- Frontier Pipeline
- Toledo Pipeline
- Chicap Pipeline
- Spearhead Pipeline
- Olympic Pipeline

### Enbridge Energy Partners

- U.S. Mainline
- North Dakota System
- Ozark Pipeline
- West Tulsa Pipeline

### Enbridge Income Fund

- Saskatchewan System



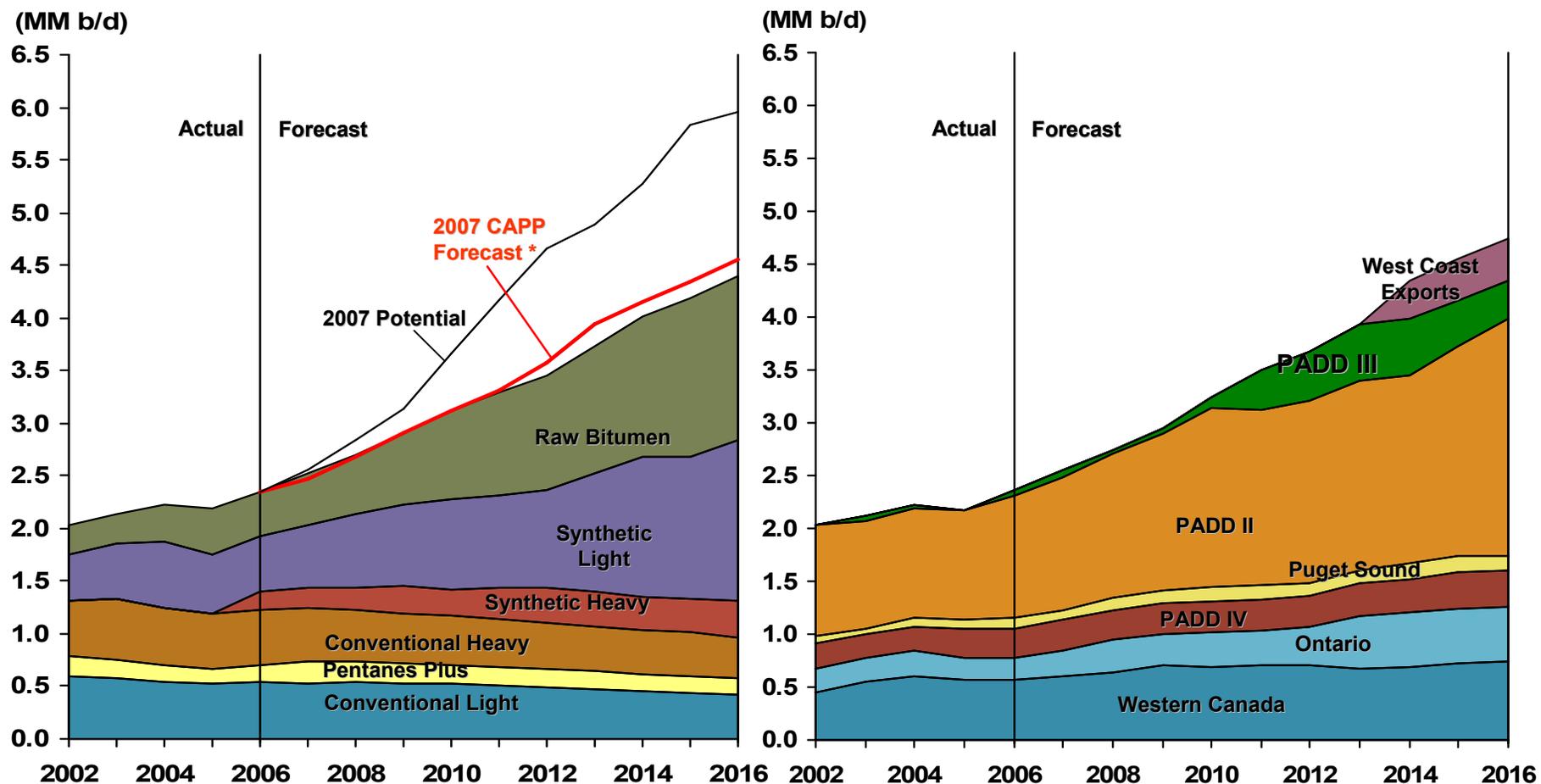
# Outline

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- **Fundamentals**
- **Growth Projects**
- **Project Economics**
- **Execution**
- **Financial Summary**

# WCSB Production and Disposition



\* Pipeline Planning Case

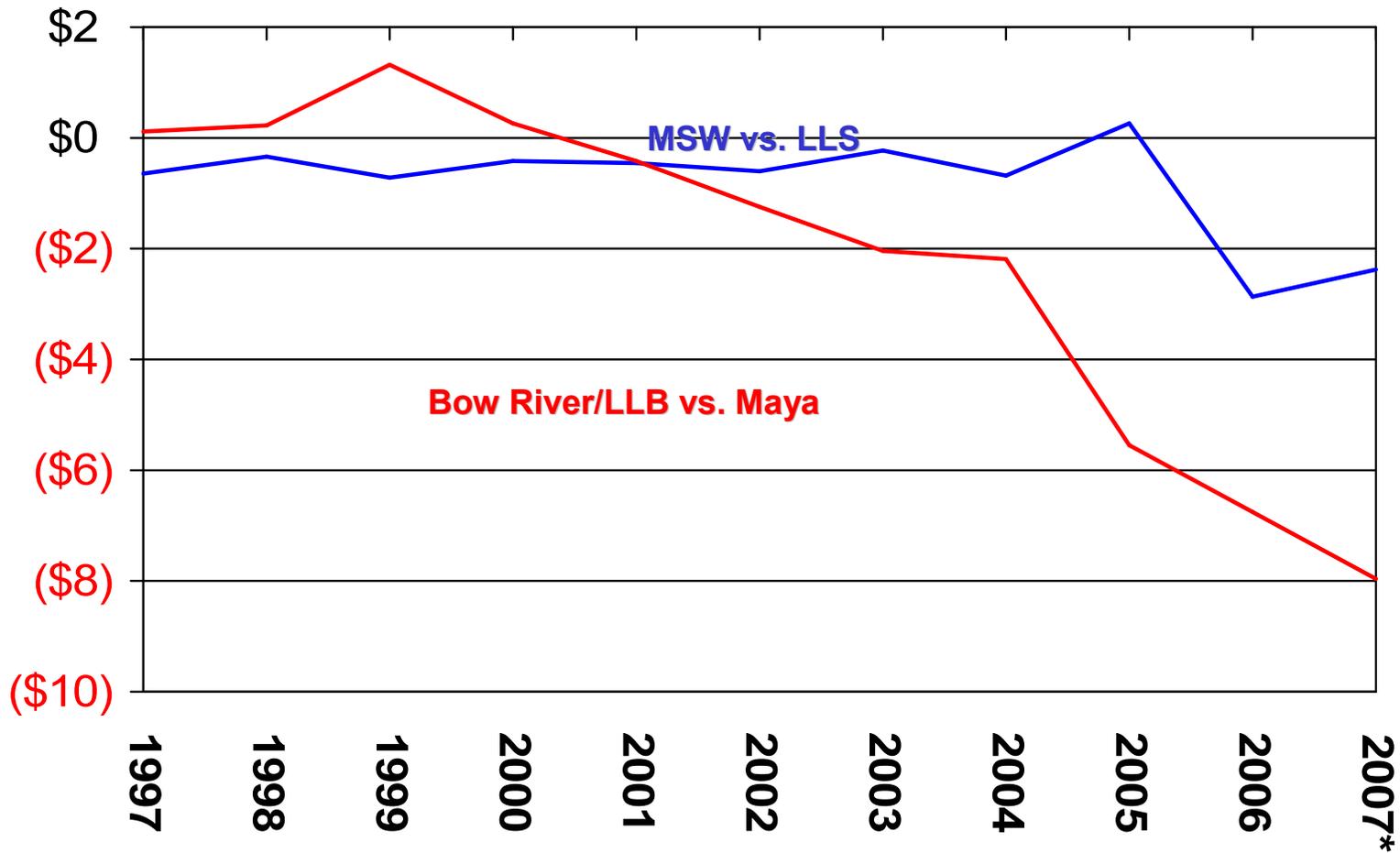
# Refinery Conversion Capacity Additions Independent Upgrader Assumptions



## Additional Demand for Canadian Heavy by 2016 (kbpd)

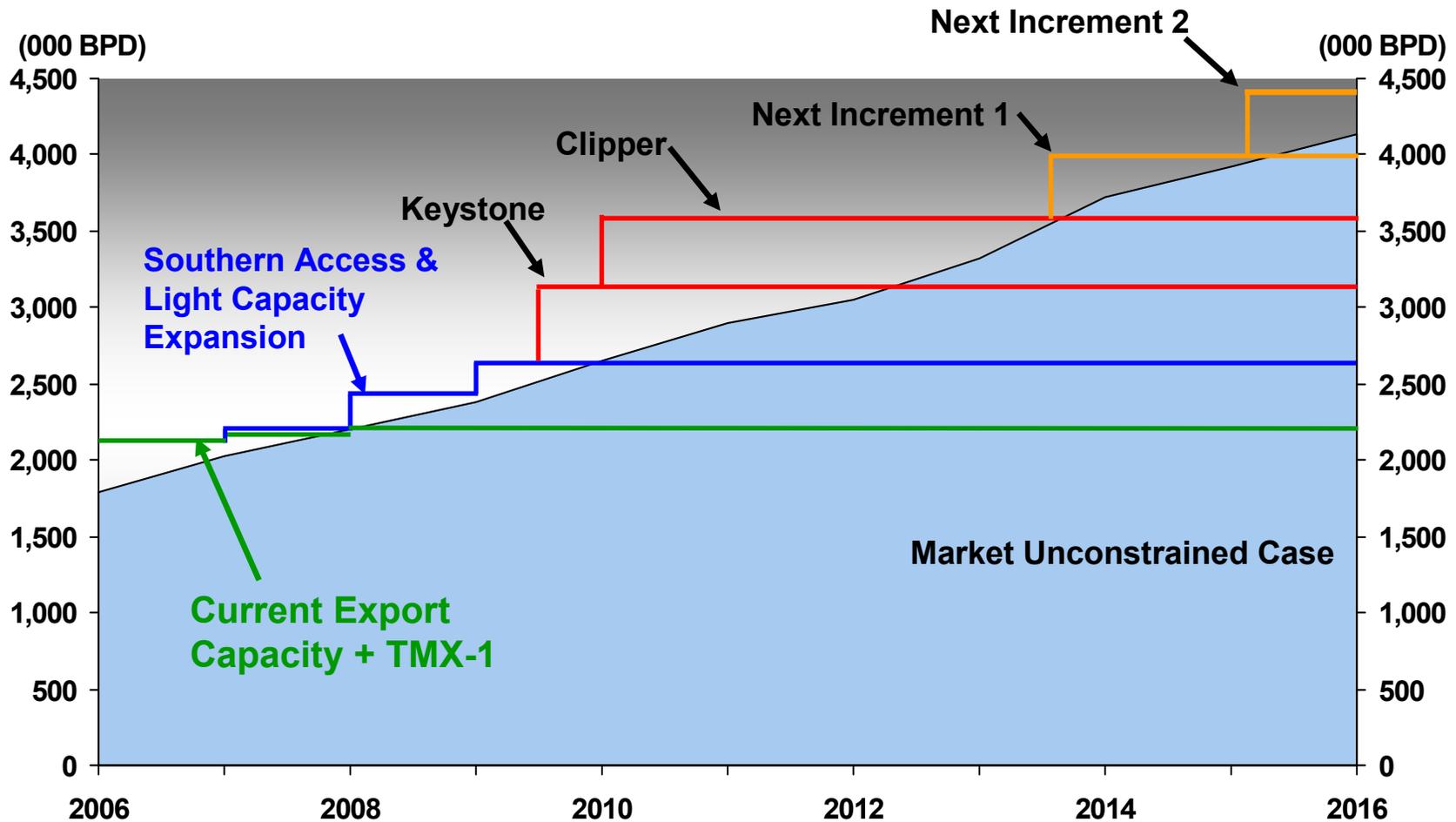
Western Canada	155
PADD II	750
Ontario	<u>125</u>
	<u>1,030</u>

# Western Canada - Historical Location Basis Differentials



\*January - August 2007 Average

# Export Production Growth vs. Pipeline Capacity



# Growth Platforms



**Regional Pipeline Development**

**Mainline Capacity Development**

**Diluent Supply**

**New Market Access**

**Terminaling and Storage**