

CERILON

The Future of Energy, Now

Cerilon is an international, privately-held corporation, headquartered in Calgary, Alberta. The company is focused on developing and managing a portfolio of energy, chemical and professional services companies. An unwavering sustainability focus, long-term partnerships, strategic agility and the ability to rapidly integrate technological advancements enhance project replicability, speed-to-market and return on investment. Cerilon is well positioned to provide energy solutions and expertise that can help create a better future.

Cerilon GTL

Cerilon GTL North Dakota will be the first large-scale, natural-gas fed Gas-To-Liquids (GTL) facility to be built in North America. The facility will also include carbon capture and sequestration, making this nominally 25,000 barrel-per-day facility the first of its kind in the world. It will be built near Trenton, in Williams County, North Dakota.

Cerilon chose western North Dakota for the project because of the abundant natural gas supply, suitable geology for carbon sequestration, and transportation access to markets. Cerilon is planning for two GTL facilities of similar capacity located on the same site. This project is the first of many and will be developed using best-in-class approaches for engaging with the local community and government, demonstrating deep care for the environment and working with partners with strong track records in project development and execution.

Timeline: Final investment decision 2028. Project start-up in 2031

Feedstock: 250 MMscf/d natural gas for each facility

Production: A nominal 25,000 bbl/day production for each facility

Products: Group III+ Base Oils, GTL Naptha; and GTL Diesel

Job Creation: Over 2,500 direct, indirect and induced jobs during construction; over 100 direct employment opportunities with an additional 2,000+ indirect and induced jobs during operations

Energy Security: US production of top-tier base oils that are currently imported and the first step to making the US the global GTL epicentre



About the Facility

This innovative facility will transform natural gas into unique, high-performance synthetic products, including industry-leading Group III+ base oils, ultra-low sulphur diesel and naphtha. GTL facilities incorporate proven processes and technologies to achieve this conversion. The first step of the GTL process is syngas generation, converting natural gas into synthesis gas. The second step, the Fischer-Tropsch (FT) process, involves a series of reactions to convert the synthesis gas into a waxy feedstock. The final step applies a suite of technologies to upgrade this waxy feedstock into high-quality final products.

GTL-derived products are of higher quality with improved environmental attributes than their crude oil-based counterparts. Cerilon's ultra-low sulfur diesel is virtually odourless, non-toxic, more readily biodegradable, and can be stored longer, making it suitable for use in sensitive or confined environments, like marinas or in underground mines. Cerilon will be the first significant producer of Group III+ base oils in North America. Use of these top-tier base oils increases energy efficiency, which creates fuel and greenhouse gas savings.

The inclusion of pre-combustion carbon capture makes this the lowest-carbon footprint GTL facility in the world. This energy solution will bring social, economic and environmental benefits while also producing useful, lower-carbon products. Cerilon is establishing global, industry-leading partnerships to deliver this pioneering GTL facility, which will be followed by replicated GTL facilities.

Current Status

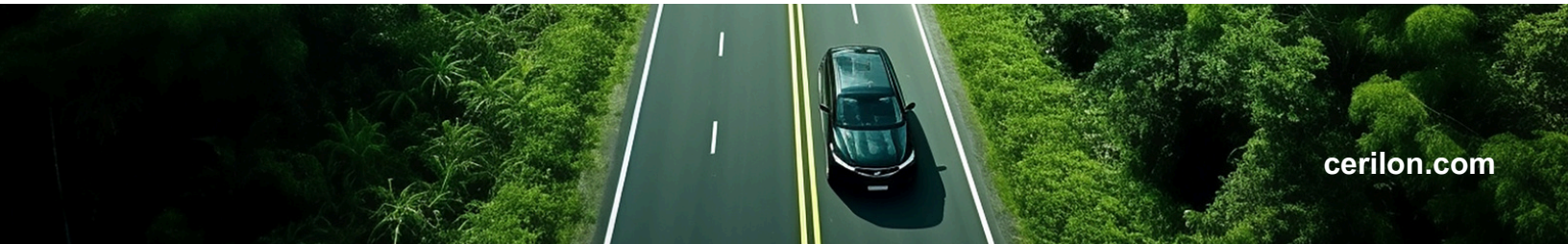
Cerilon is focused on establishing commercial and financial arrangements for the facility and is progressing with engineering and permitting to achieve a target start-up in 2031. Cerilon has continued to progress the project development consistent with its master project plan and continues to appreciate the strong support provided by all stakeholders. Financing for construction is progressing as planned.

The facility required a number of State and County authorizations for siting and environmental components. All key permits from the North Dakota Department of Environmental Quality, the North Dakota Public Service Commission and Williams County have been issued for two project phases.

The project is currently progressing front-end engineering and design (FEL 3).

Strategic Site Selection

The site for Cerilon GTL North Dakota was selected for its proximity to natural gas supply, access to rail and road loading facilities, access to electrical power for startup and for interconnection to supply excess power to the grid, access to other utilities and services, and suitable geology for carbon capture and sequestration (CCS).





CERILON

A local, stable, responsible and reliable domestic supplier of superior products

Our GTL Products

Base Oils

High VI, pour point properties, good oxygen stability, top-tier volatility and cold-flow properties, clear and water-white, virtually odourless. Cerilon's base oils will be premium quality synthetic fluids classified as Group III+ base oils. Use of these base oils increases engine efficiency and creates fuel and greenhouse gas emission savings. These top tier Group III+ base oils will have many uses in energy and lower-carbon applications, including as specialty fluids in hybrid electric vehicles, high quality lubricants that improve fuel efficiency for gasoline-powered engines and as industrial lubricants in a wide range of applications. Cerilon will be the first significant producer of Group III+ base oils in North America, reducing the need to import these products.

GTL Diesel

Ideal for both hot and extremely cold climates, low emissions, very high cetane (>70 compared to ~44 conventional), clear water-white appearance, non-toxic to aquatic organisms, and readily biodegradable. Cerilon's ultra-low sulfur diesel will be a drop-in alternative for crude oil-based diesel that offers a higher cetane level and cleaner engine burn with reduced emission levels. Unlike conventional diesel, GTL diesel is non-toxic, nearly odourless and is readily biodegradable. Its properties mean that it has a longer storage capability, making it suitable for critical military, agricultural, and resource development applications.

GTL Naphtha

Highly paraffinic, essentially aromatics free, nominally no sulfur, virtually odourless, clear water-white appearance. Naphtha is a mixture of hydrocarbons that can be sold for further processing or used as a diluent for heavy crude pipeline transport.



Project Economics

Cerilon's 30-plus year economic model paired with long-term energy price forecasts by recognized forecasting bodies show stable, attractive financial returns, using long-term conservative assumptions. The financial strength of the project is enabled by:

- An optimized product mix,
- Limited domestic production relative to total local demand for our Group III+ base oils, further underpinned by forecasted growing demand in North America for these products, and
- The high purity and unique properties of GTL products and abundance of locally available natural gas.

Related Media Releases

- **March 26, 2026: Cerilon and Sasol/Topsoe Enter into Technology Licencing Agreements**
- **February 11, 2026:** Cerilon Enters Into Diesel Offtake Agreement
- **September 30, 2025:** Cerilon and Pembina Enter Into Naphtha Offtake Agreement
- **December 23, 2024:** Final Major Permit Issued for Cerilon GTL North Dakota
- **December 10, 2024:** North Dakota Department of Environmental Quality Issues a Permit to Construct for Cerilon GTL North Dakota
- **September 27, 2024:** North Dakota Public Service Commission Approves a Certificate of Site Compatibility
- **June 4, 2024:** Cerilon GTL ND Moves into FEED
- **May 1, 2024:** Cerilon Awards GTL Project Agreement to Worley
- **April 4, 2024:** Williams County Approves the Conditional Use Permit for Cerilon GTL North Dakota
- **March 13, 2024:** Cerilon and Chevron Enter Into Technology Licencing agreements
- **March 15, 2023:** Worley to Engineer Cerilon North Dakota Gas-to-Liquids Facility
- **March 9, 2023:** ABB Wins Automation Contract for Cerilon's First Gas-to-Liquids Plant

Project Benefits

Enhanced opportunities. New technology, business opportunities, quality jobs and tax revenue to the County and the State.

Environmental responsibility. An environmentally responsible solution to excess natural gas production and takeaway limitations.

Energy security. Strategic energy self-sufficiency and security by using existing and future gas supplies to generate premium quality synthetic energy products in the state.

Improved local services. Impetus for improved local utilities and services.

Downstream industry growth. Contribution to the growth of North Dakota's downstream industry.

Lower-carbon solution. Supports North Dakota's carbon neutrality goals.

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