

Canada Oil and Gas Report Q1 2016

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Abstracts

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BMI View: Our growth outlook for Canada's oil and gas industry remains modest given mounting headwinds in both the upstream and midstream sectors amid a low oil price environment.

The greatest threats to these projects are unfavourable project economics and regulatory headwinds that will hamper the growth of oil sands-driven production and LNG terminal development, weighing on total hydrocarbon output.

This is exacerbated by the likely drop in exploratory activity throughout Canadian acreage as companies revise capital expenditures in the coming year.

The latest developments in Canada's oil and gas sector are:

We are reaffirmed in our negative outlook on long-term crude production growth in Canada following the election victory for the Liberal Party on October 19. A low oil price outlook and insufficient pipeline takeaway capacity will combine with the government's strong environmental mandate to undermine upstream and midstream developments.

Continued output growth in Canadian oil sands over the next two years will increase exported volumes of crude into the US. Lower oil prices have threatened the development of upstream projects beyond 2017, encouraging further cost saving measures throughout the oil-producing province of Alberta. However, we maintain that post-final investment decision (FID) projects that have already incurred substantial costs will continue to be brought online, increasing output by an average rate of 6.0% y-o-y between 2015 and 2017.

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