

Canada Oil and Gas Report Q2 2015

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Abstracts

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BMI View: Our growth outlook for Canada's oil and gas industry has grown more modest over the past several quarters given mounting headwinds in both the upstream and midstream sectors due to a lower oil price environment. The greatest threats to these projects are the challenging project economics and regulatory headwinds that could 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 years, with reserves likely to suffer as a result.

The main trends and developments we highlight for Canada's oil and gas sector are:

Canada's proven oil reserves are expected to trend lower from 172.5bn bbl at the beginning of 2015 to 170.0bn bbl by 2019 due to a slowdown in oil sands investment. We expect reserves to continue declining thereafter due to lower upstream activity on the back of sustained lower oil prices.

Proven gas reserves will increase from 2.0tcm at the beginning of 2015 to a peak of 2.13tcm in 2019 as exploration begins to decline. From 2020 thereafter, reserves will to experience steady declines through the remainder of our forecast period, falling to 2.0tcm by 2024.

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