

Canada Oil and Gas Report Q4 2015

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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 lower 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 years, with reserves likely to suffer as a result. The main trends and developments in Canada's oil and gas sector are:

Canada's proven oil reserves are expected to trend lower from 172.0bn bbl at the beginning of 2015 to 167.9bn bbl by 2019 due to a slowdown in oil sands investment. We expect reserves to steadily decline thereafter due to lower upstream activity on the back of sustained lower oil prices.

Proven gas reserves will increase from 2.04tcm at the beginning of 2015 to 2.03tcm in 2018 as exploration activity begins to decline. From 2019 thereafter, reserves will experience steady growth through the remainder of our forecast period, reaching 2.2tcm by 2024.

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