



Natural Resources
Canada

Ressources naturelles
Canada

ENERGY FACT BOOK

2021-2022



Canada 



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ENERGY **FACT BOOK** 2021–2022

Canada 

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PREFACE

The purpose of the *Energy Fact Book* is to provide key information on energy markets in Canada in a format that is easy to consult. Resources including a summary of units and conversion factors, abbreviations, and data sources used throughout this publication are available in the annexes.

All data is subject to revisions by statistical sources. In some instances, more than one source may be available and discrepancies in numbers may occur because of conceptual or methodological differences. In addition, some numbers may not add up precisely due to rounding.

This publication was assembled by the Energy and Economic Analysis Division of the Energy Policy and International Affairs Branch with the help of subject experts from across Natural Resources Canada (NRCan).

For questions or comments, contact NRCan at **nrcan.energyfacts-faitsenergetiques.rncan@canada.ca**.

In this publication, energy industries are generally considered to include oil and gas extraction; coal mining; uranium mining; electric power generation, transmission and distribution; pipeline transportation; natural gas distribution; biofuels production; petroleum refineries; and support activities for oil and gas extraction. The petroleum sector is a subset of these industries, and in this publication consists of oil and gas extraction and support activities, pipeline transportation and distribution of oil and gas, and petroleum refineries.

Clean energy industries such as renewable and nuclear electricity generation, biofuels production and carbon capture and storage facilities are contained within the definition of energy industries. Some energy-related industries (e.g. petroleum product wholesaler-distributors and coal product manufacturing) are excluded because of a lack of data.

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INTRODUCTION

From an energy perspective, Canada is very fortunate. We have a large land mass, small population and one of the largest and most diverse supplies of energy in the world. Our rivers discharge close to 7% of the world's renewable water – a tremendous source of hydroelectric power. We have the fourth-largest proven oil reserves and third-largest reserves of uranium; our energy resources are a source of strength that continues to shape our economy and society.

Canada is at the forefront of innovative technologies for how we produce and use energy. For example, low- or non-emitting forms of energy are growing in significance as part of our evolving electricity mix. In fact, wind and solar photovoltaic (PV) energy are the fastest-growing sources of electricity generation in Canada. In addition, technological advancements, such as co-generation, have resulted in an increase in energy-efficient practices and a reduction in greenhouse gas (GHG) emissions in areas such as the oil sands. Ongoing developments in areas such as grid-scale electricity storage, carbon capture and storage, hydrogen, and electric and alternative fuel vehicles have the potential to further transform the energy system.

For over ten years, the *Energy Fact Book* has provided a solid foundation for Canadians to understand and discuss important developments across the energy sector. A significant milestone in Canadian energy information was recently achieved with the launch of the Canadian Center for Energy Information (CCEI). Housed at Statistics Canada, the CCEI brings together Canada's existing energy information in one place, facilitating access to products like the Energy Fact Book.

Section 1:

Key Energy, Economic and Environmental Indicators

Energy production and supply

Economic contributions

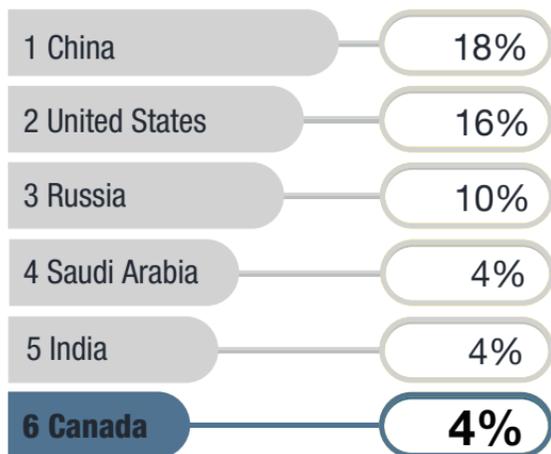
Energy and GHG emissions

ENERGY PRODUCTION AND SUPPLY

CANADA: A GLOBAL ENERGY LEADER

The amount of primary energy produced by Canada in 2019 is **33% more** than in 2005. The world, on average, has increased energy production by **28%** in the same period.

WORLD TOTAL PRIMARY ENERGY PRODUCTION TOP ENERGY PRODUCERS, 2019



GLOBAL ENERGY RANKINGS FOR CANADA

	Proved reserve/ capacity	Production	Exports
Crude oil	4	4	3
Uranium	3	4	6
Hydroelectricity	3	3	-
Electricity	8	6	3
Coal	16	14	6
Natural gas	17	5	6

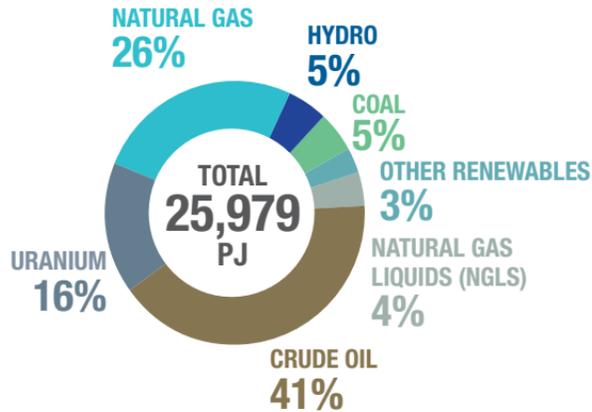
CANADIAN ENERGY PRODUCTION

Primary energy is energy that is found in nature before any processing or conversion. The *Energy Fact Book* calculates primary energy production by using two methods. The first method treats the energy embodied in uranium as primary energy, thereby capturing the uranium Canada produces and then exports. This method provides a more accurate picture of energy production in Canada.

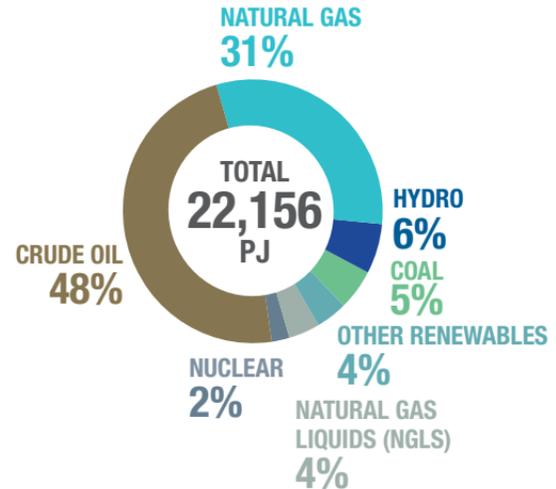
The second method—also employed by the International Energy Agency (IEA), the Energy Information Administration (EIA) and others—treats domestic electricity production from nuclear energy as primary energy, but not uranium itself. Uranium is energy-dense, and Canada exports most of its uranium production, which explains why the two methods produce such different results.

PRIMARY ENERGY PRODUCTION BY SOURCE (2019)

PRIMARY ENERGY PRODUCTION,
INCLUDING URANIUM



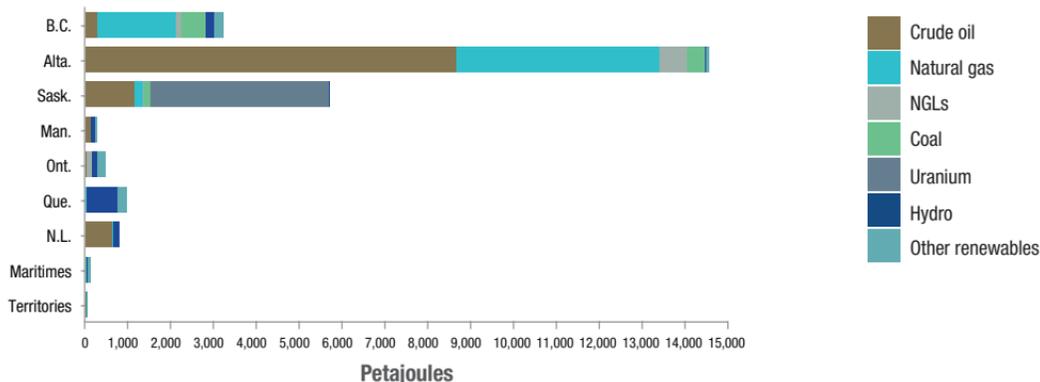
PRIMARY ENERGY PRODUCTION,
EXCLUDING URANIUM



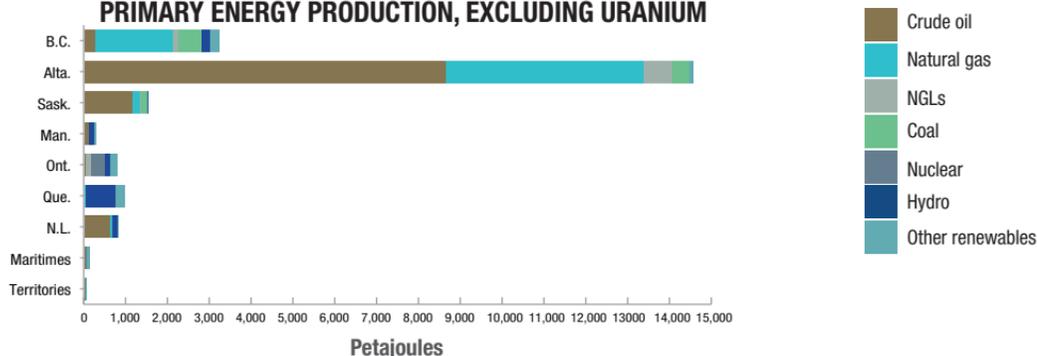
"Other renewables" includes wind, solar, wood/wood waste, biofuels and municipal waste.

PRIMARY ENERGY PRODUCTION BY REGION AND SOURCE (2019)

PRIMARY ENERGY PRODUCTION, INCLUDING URANIUM



PRIMARY ENERGY PRODUCTION, EXCLUDING URANIUM

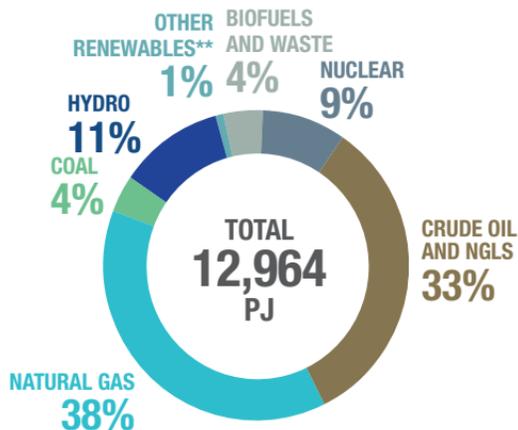


CANADA'S ENERGY PRODUCTION AND USE

A look at Canada's total primary energy supply (TPES) helps to better understand the impact of energy sources on GHG emissions. The TPES¹ is calculated as:

$$\text{TPES} = \text{PRODUCTION} + \text{IMPORTS} - \text{EXPORTS} + \text{STOCK CHANGES}$$

CANADA TOTAL PRIMARY ENERGY SUPPLY,* BY SOURCE, 2019



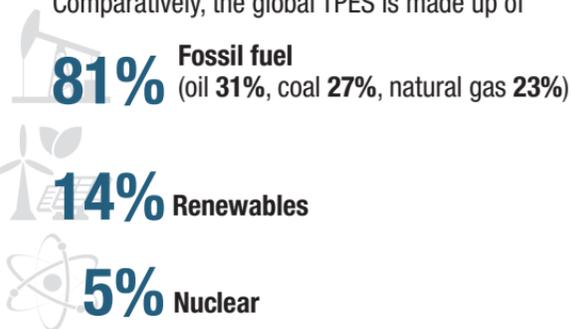
* not including electricity trade

***Other renewables" includes wind, solar and geothermal.

¹ For the purposes of TPES, electricity production is calculated by using the energy content of the electricity (i.e. at a rate of 1 TWh = 0.086 Mtoe), with the exception of nuclear electricity, which is calculated assuming a 33% conversion efficiency factor increase (i.e. 1 TWh = 0.086 ÷ 0.33 Mtoe).

- Fossil fuels made up **76%** of Canada's TPES in 2019.
- Renewable energy sources made up **16.2%** of Canada's TPES in 2019.

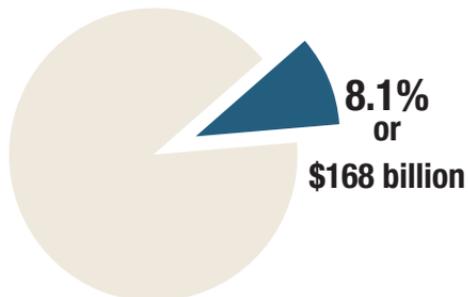
Comparatively, the global TPES is made up of



ECONOMIC CONTRIBUTIONS

NOMINAL GROSS DOMESTIC PRODUCT (2020) ENERGY'S NOMINAL GDP CONTRIBUTION FOR CANADA

NOMINAL GDP (% OF CURRENT DOLLARS)



CANADIAN GDP

ENERGY DIRECT 5.8% (\$121 billion)

PETROLEUM 3.9%

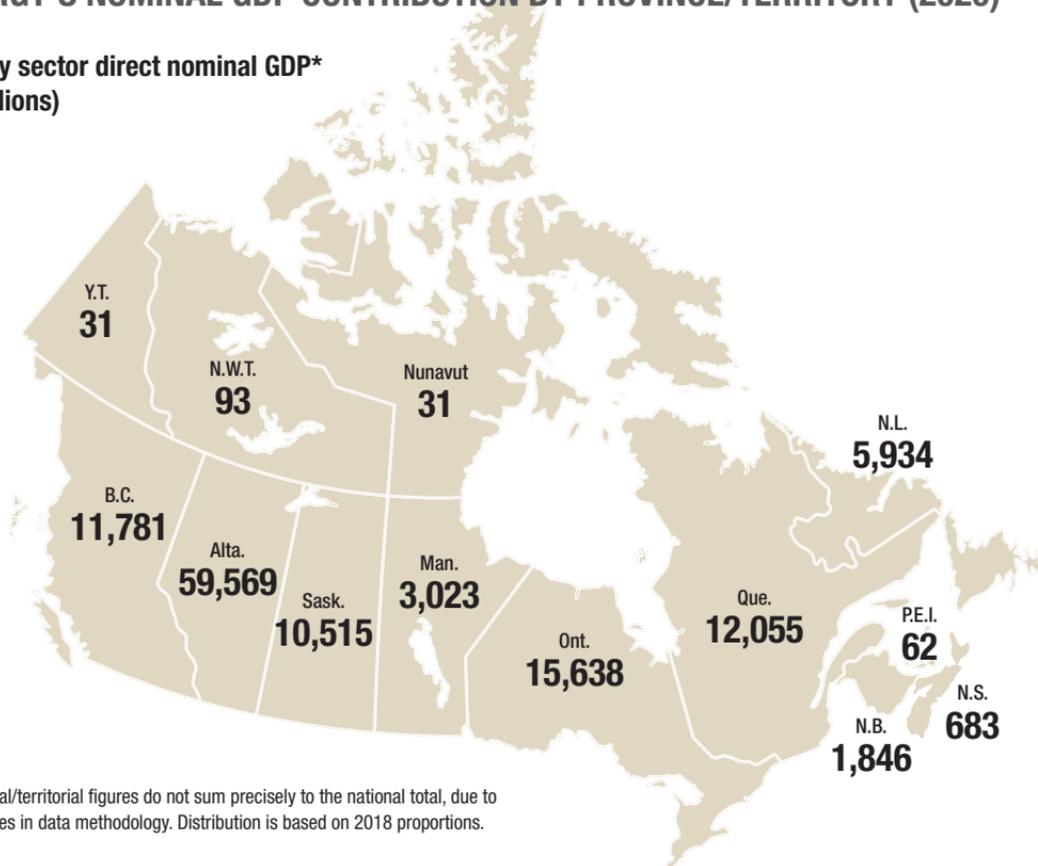
ELECTRICITY 1.8%

OTHER 0.2%

ENERGY INDIRECT 2.3% (\$48 billion)

ENERGY'S NOMINAL GDP CONTRIBUTION BY PROVINCE/TERRITORY (2020)

Energy sector direct nominal GDP*
(\$ millions)



*Provincial/territorial figures do not sum precisely to the national total, due to differences in data methodology. Distribution is based on 2018 proportions.

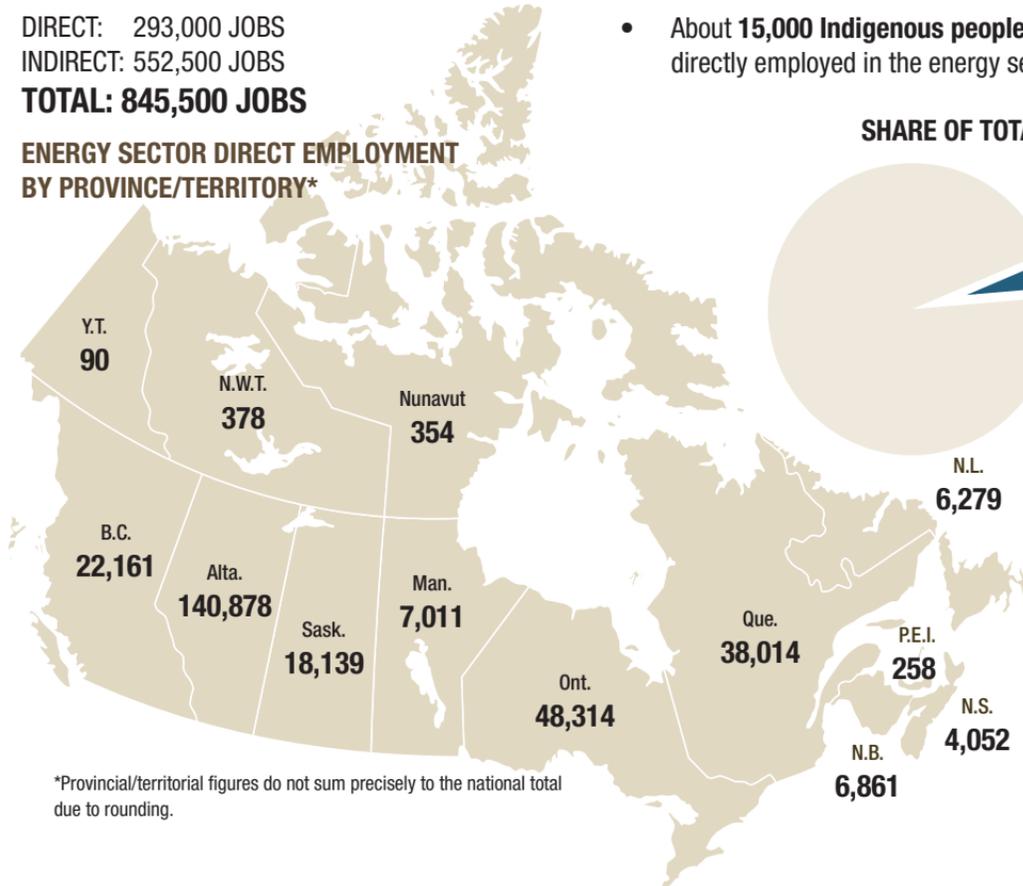
EMPLOYMENT IN CANADA'S ENERGY SECTOR (2020)

DIRECT: 293,000 JOBS

INDIRECT: 552,500 JOBS

TOTAL: 845,500 JOBS

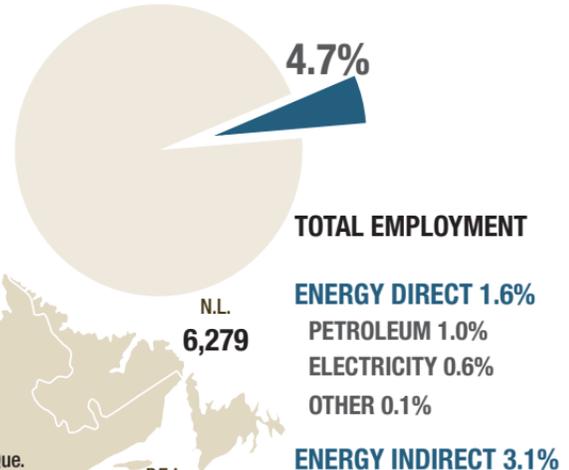
ENERGY SECTOR DIRECT EMPLOYMENT BY PROVINCE/TERRITORY*



*Provincial/territorial figures do not sum precisely to the national total due to rounding.

- About **15,000 Indigenous people** living off-reserve are directly employed in the energy sector.

SHARE OF TOTAL EMPLOYMENT, 2020



ENERGY TRADE (2020)

Exports

\$95.1 billion



of total Canadian goods exports



Oil and gas domestic exports totalled

\$86 billion

of which **95%** were to the U.S.



The U.S. accounts for



90%
of energy exports
by value
(\$86.0 billion).

Imports

\$30.9 billion



of total Canadian goods imports



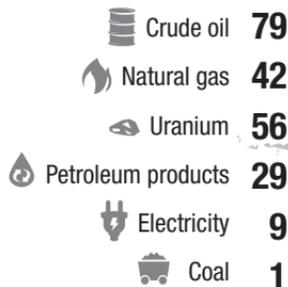
The U.S. accounts for



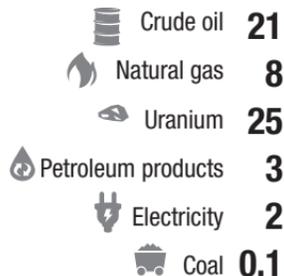
77%
of energy imports
by value
(\$24 billion).

CANADA-U.S. ENERGY TRADE IN 2020

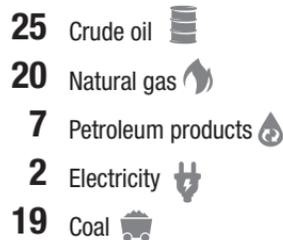
Exports to the U.S. (% of Canadian production)



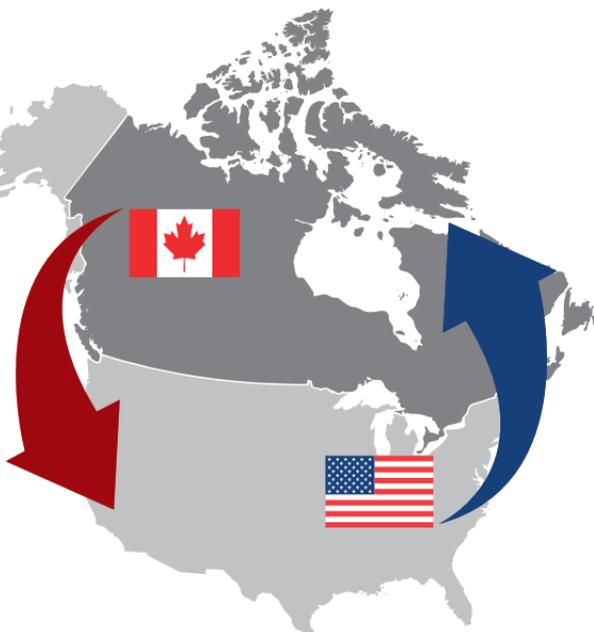
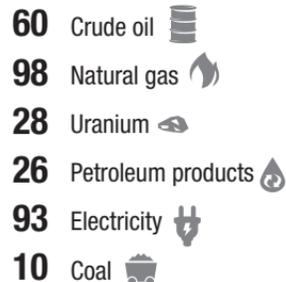
Exports to the U.S. (% of U.S. consumption)



Imports from the U.S. (% of Canadian consumption)



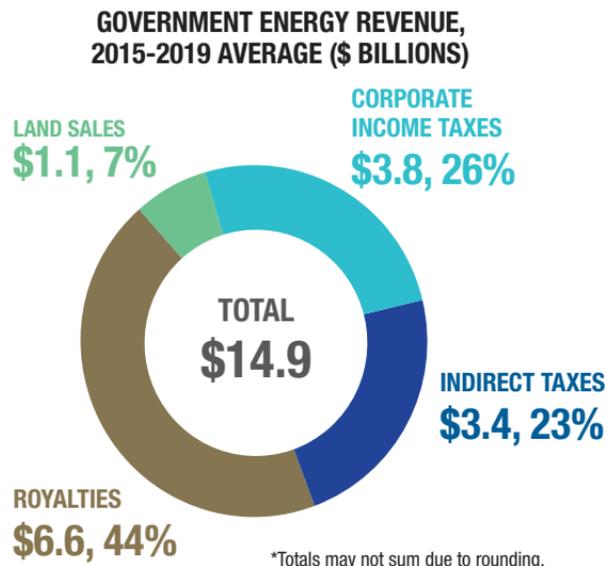
Exports to the U.S. (% of U.S. imports)



Figures on uranium production and exports to the United States are based on a four year average of 2017-2020.

GOVERNMENT REVENUES

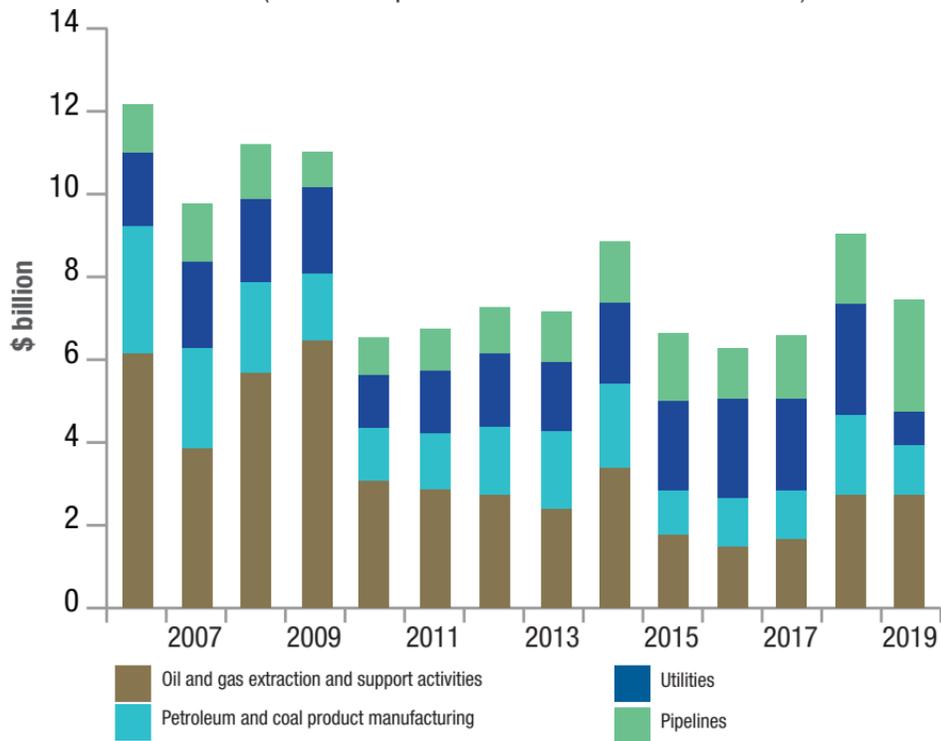
Federal and provincial/territorial governments in Canada receive direct revenues from energy industries through corporate income taxes, indirect taxes (such as sales and payroll taxes), crown royalties, which are the share of the value of oil and gas extracted that is paid to the Crown as the resource owner, and crown land sales, which are paid to the Crown in order to acquire the resource use for specific properties.



- An important share of government revenues is collected from the petroleum sector, which averaged **\$13 billion** over the last five years, including **\$10 billion** from upstream oil and gas extraction and its support activities.
- Between 2015 and 2019, the energy sector's share of taxes paid by all industries was **6.9%**. Operating revenues of the energy sector represented **9.6%** of all operating revenues earned by industries in Canada.

TOTAL TAXES PAID BY ENERGY INDUSTRIES

(includes corporate income taxes and indirect taxes)



ENERGY AND GHG EMISSIONS



Globally,

78%

of GHG emissions from human activity are from the production and consumption of energy.



This includes activities such as using gasoline for transportation, non-renewable electricity production, oil and gas production, and heating and cooling buildings.



In Canada, **about 81%** of emissions come from energy. Canadians use more energy because of our extreme temperatures, vast landscape and dispersed population.

The challenges of **transitioning to a lower-carbon energy system** are numerous, but they also present opportunities for **Canada to be a global leader by supporting innovative technologies in the energy sector**, including **promoting our growing renewables and cleantech sectors.**



Since 2000, there has been a decoupling between the growth of Canada's economy and GHG emissions, largely because of technological improvements, regulations, and more efficient practices and equipment.

Between 2000 and 2019,
Canada's GHG emissions
decreased by

↓ **0.2%**

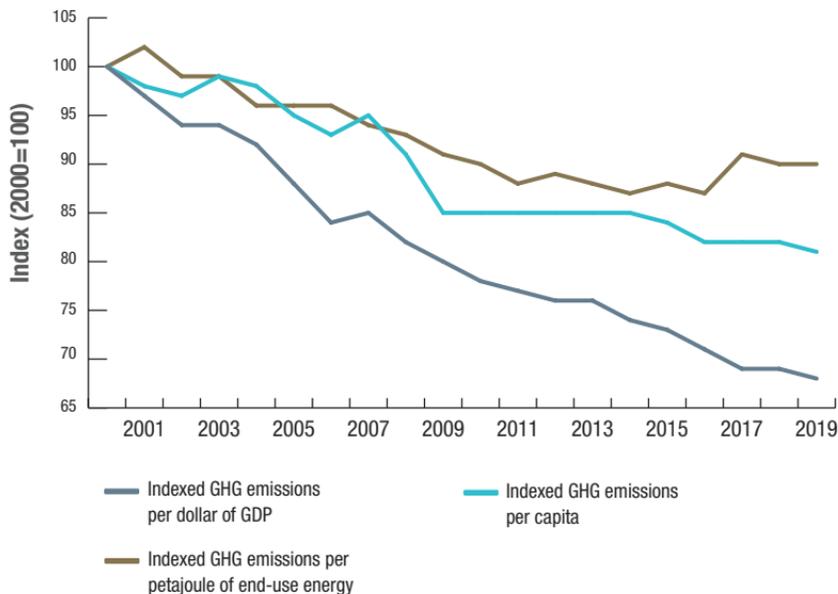
while GDP increased

↑ **47%**

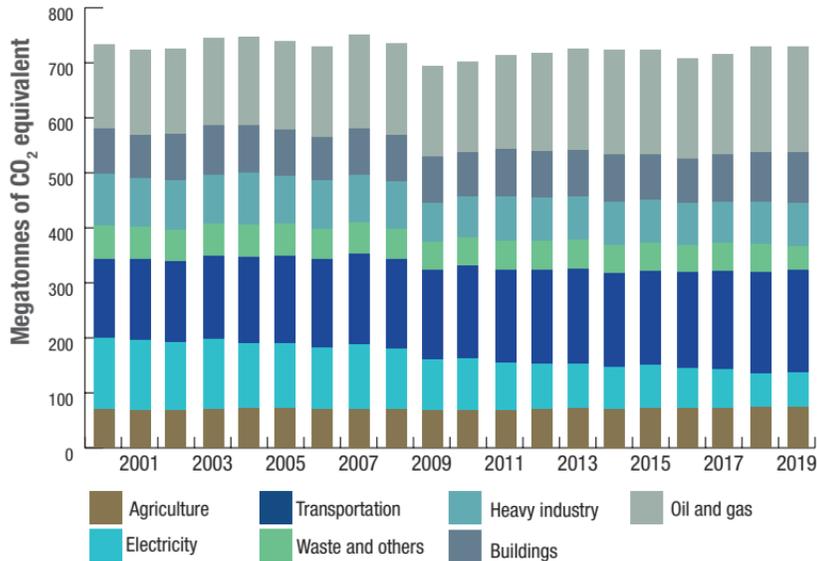
GHG emissions decreased

↓ **32%**
per dollar of GDP and
19%
per capita.

INDEXED TREND IN GHG EMISSIONS PER PERSON, PER UNIT OF GDP AND PER UNIT OF ENERGY CONSUMED, 2000–2019



GHG EMISSIONS BY CANADIAN ECONOMIC SECTOR, 2000–2019



- Between 2000 and 2019, **emissions from electricity production decreased 50%**, largely because of Ontario's successful coal phase-out action plan, which started in 2001.
- **Emissions from oil and gas production increased 25%** largely due to an increase of 38% in production.
- **Emissions from heavy industry have decreased by 17%** despite an increase in GDP of **16%** in the industrial sector. This is largely due to improvements in energy efficiency.

Section 2:

Investment

Capital expenditures

Canada's Energy Infrastructure and Major Energy Projects

Foreign Direct Investment and Canadian Direct Investment Abroad

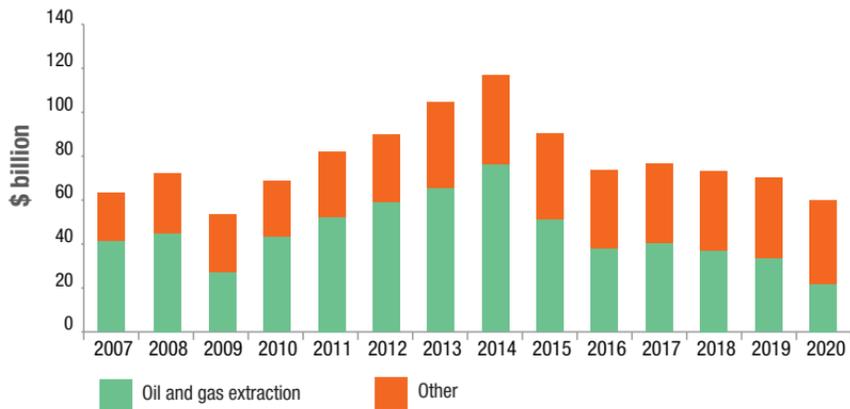
Canadian Energy Assets Abroad, foreign control of assets

RD&D and Mission Innovation

Environmental Protection Expenditures

CAPITAL EXPENDITURES

Capital expenditures* in the energy industry, 2007-2020

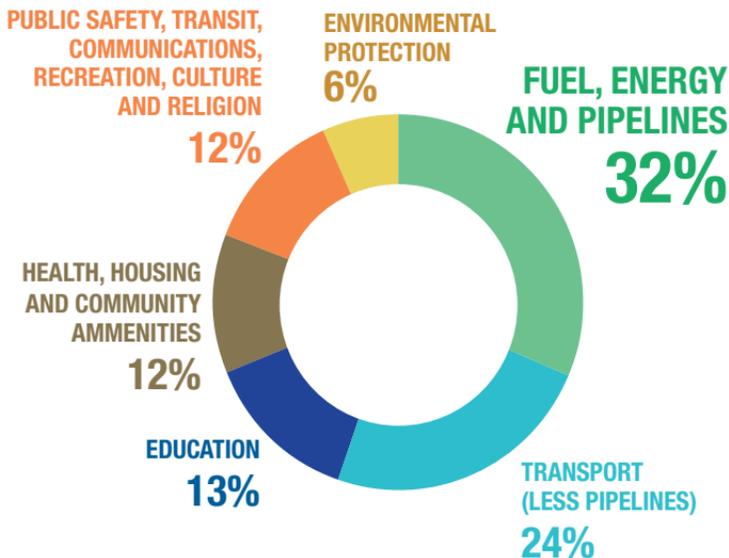


- Capital expenditures in Canada's energy sector totaled **\$60 billion** in 2020, a decrease of 49% from a peak in 2014.
- Throughout 2016-19, investment fluctuated between **\$70-77 billion**, before declining to **\$60 billion** in 2020.
- Oil and gas extraction was the largest area of capital expenditure at **\$21.7 billion** in 2020, followed by electric power generation and transmission at **\$21.2 billion**.

*Excludes residential expenditures and intellectual property investments such as exploration expenses. Includes investments in renewable electricity, does not capture other forms of renewable energy.

CANADA'S ENERGY INFRASTRUCTURE

Fuel, energy and pipeline infrastructure made up the largest proportion of Canada's infrastructure at **32%** of net stock in 2020.



Statistics Canada defines infrastructure as:

“

the physical structures and systems that support the production of goods and services and their delivery to and consumption by governments, businesses and citizens.

”

Fuel, energy and pipeline infrastructure includes electric power infrastructure like wind and solar, hydro, nuclear, and thermal generation, power transmission and distribution lines and oil and gas pipelines.

FUEL, ENERGY AND PIPELINE INFRASTRUCTURE INVESTMENT AND OPERATIONS

created
103.5k jobs

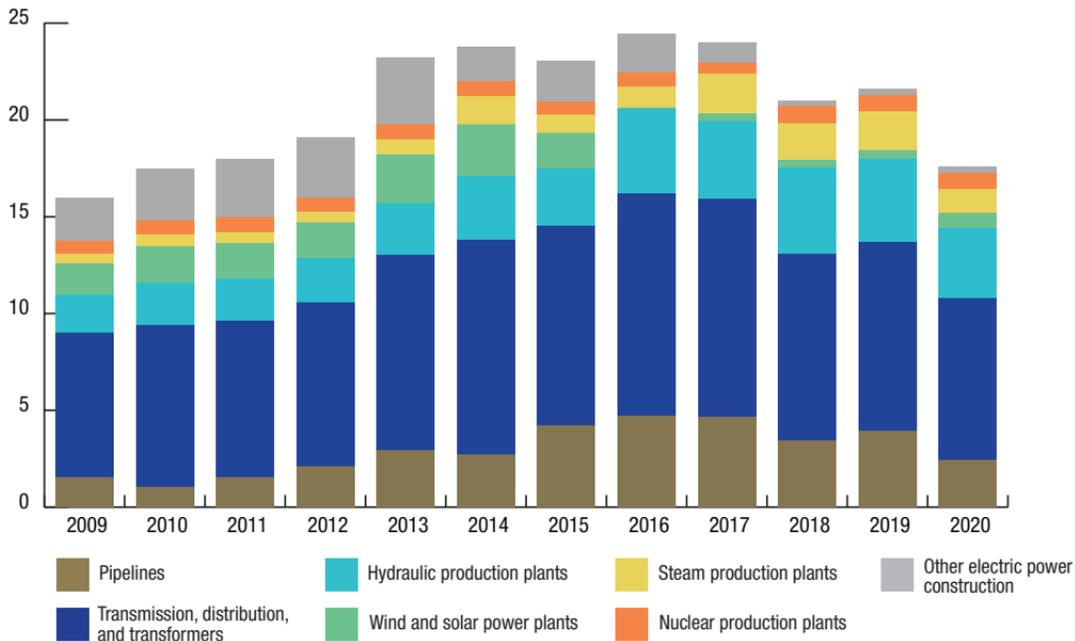
generated **\$8.1 billion**
in employment income

and **\$15.8 billion**
in GDP
in 2020
(direct and indirect contributions).



Public and private investment in fuel, energy and pipeline infrastructure in 2020 was of **\$20.1 billion** (nominal).

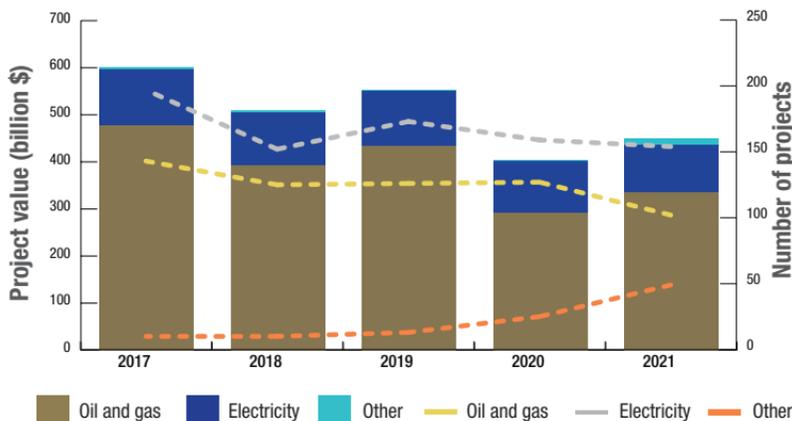
Public and private investment in fuel, energy and pipeline infrastructure, billion \$ (constant 2012)



CANADA'S MAJOR ENERGY PROJECTS

- In 2021, there were 305 planned (announced, under review, or approved) energy projects worth **\$449 B**, and 97 energy projects under construction worth **\$139 B**.
- Oil and gas sector projects accounted for the largest portion of project value (\$336 billion), while there were more electricity projects overall (154).
- There were **168 clean technology projects** valued at **\$92.1 B**.

Trends in Major Energy Projects, 2017-2021



Natural Resources Canada's Major Projects Inventory captures information on major natural resource projects in Canada that are either currently under construction or planned in the next 10 years.

Minimum capital thresholds for inclusion are: **\$50 million** for oil and gas, **\$20 million** for electricity, and **\$10 million** for other clean energy or technology projects.

Projects that are either announced, under review, approved and under construction are included.

CLEAN TECHNOLOGY PROJECT TRENDS 2017-2021

	2017	2018	2019	2020	2021
Total Clean Technology Projects	172 projects (\$107.5B)	135 projects (\$100.6B)	145 projects (\$90.8B)	146 projects (\$88.5B)	168 projects (\$92.1B)
Hydro	80 projects (\$49.7B)	64 projects (\$45.9B)	66 projects (\$49.0B)	57 projects (\$48B)	56 projects (\$39B)
Wind	42 projects (\$10.6B)	26 projects (\$8.8B)	29 projects (\$8.6B)	34 projects (\$7.8B)	40 projects (\$14.2B)
Biomass/Biofuels	31 projects (\$8.2B)	28 projects (\$6.2B)	32 projects (\$3.0B)	28 projects (\$4.5B)	30 projects (\$7B)
Solar	9 projects (\$0.6B)	6 projects (\$0.8B)	5 projects (\$0.7B)	7 projects (\$0.9B)	20 projects (\$3.2B)
Nuclear	4 projects (\$28.5B)	4 projects (\$28.3B)	5 projects (\$28.5B)	3 projects (\$26.1B)	4 projects (\$27.4B)
Carbon Capture and Storage	2 projects (\$9.1B)	2 projects (\$10.3B)	1 project (\$0.6B)	0 projects (\$0.0B)	0 projects (\$0.0B)
Geothermal	2 projects (\$0.4B)	1 project (\$0.0B)	2 projects (\$0.2B)	3 projects (\$0.3B)	5 projects (\$0.4B)
Tidal	1 project (\$0.1B)	0 projects (\$0.0B)	1 project (\$0.2B)	5 projects (\$0.3B)	5 projects (\$0.3B)
Other¹	1 project (\$0.2B)	4 projects (\$0.3B)	4 projects (\$0.4B)	9 projects (\$0.7B)	8 projects (\$0.7B)

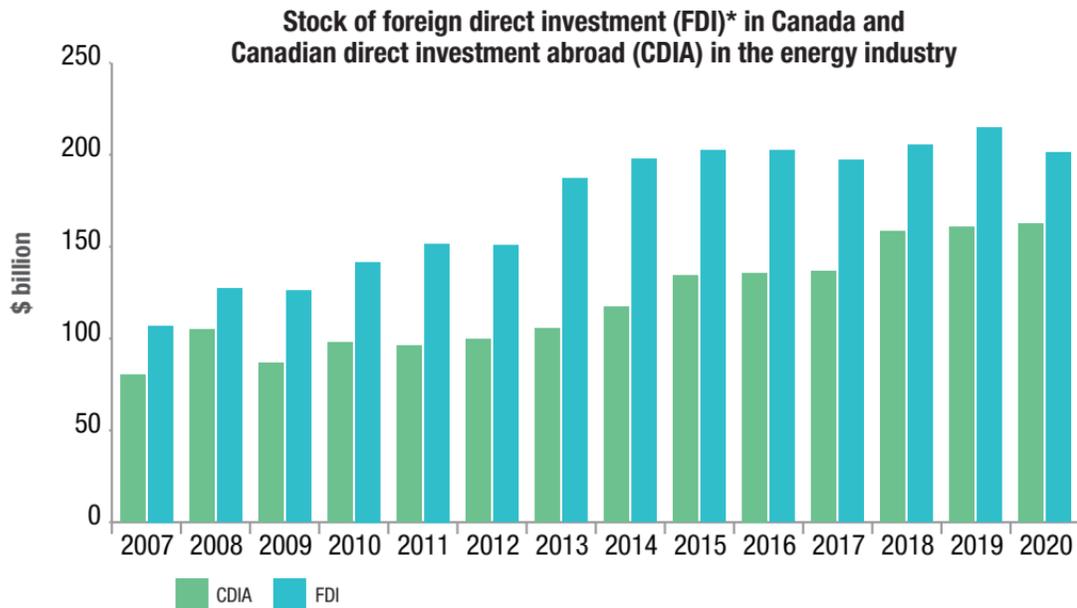
¹ Other includes novel initiatives such as micro-grid projects, battery storage projects, bioplastics, and a helium purification plant.

MAJOR ENERGY PROJECTS PLANNED AND UNDER CONSTRUCTION, 2020-2030



INTERNATIONAL INVESTMENTS AND INVESTORS

Canada's energy industries operate in free markets, where investments by both Canadian and foreign companies ensure an efficient, competitive and innovative energy system.



* Direct investment is defined as a company owning a minimum of 10% of voting equity interest in a foreign enterprise and is measured as the total equity value at the time of acquisition. Excludes residential expenditures and intellectual property investments such as exploration expenses.

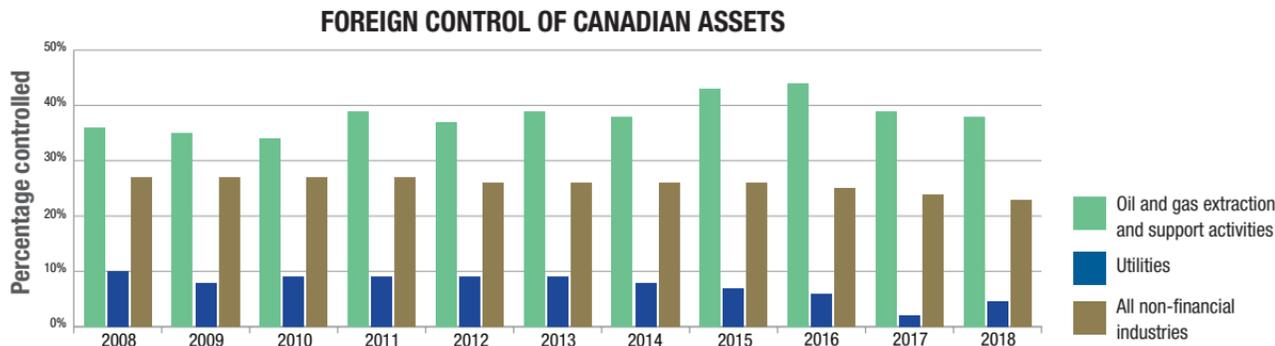
Excludes investments in renewable energy other than electricity.

STOCK OF FOREIGN DIRECT INVESTMENT IN CANADA AND CANADIAN DIRECT INVESTMENT ABROAD

- The stock of **foreign direct investment (FDI)** in the energy sector dipped slightly in 2020 to **\$201 billion** (-6.3% over the previous year).
- The energy industry's share of overall FDI in Canada was **19%** in 2020, down **2%** from 2019.
- The stock of **Canadian direct investment abroad (CDIA)** was valued a record high **\$162 billion** in 2020, up **1%** from 2019.
- Investment in oil and gas extraction accounted for **\$60 billion** of the CDIA stock in 2020.

FOREIGN CONTROL OF CANADIAN ASSETS

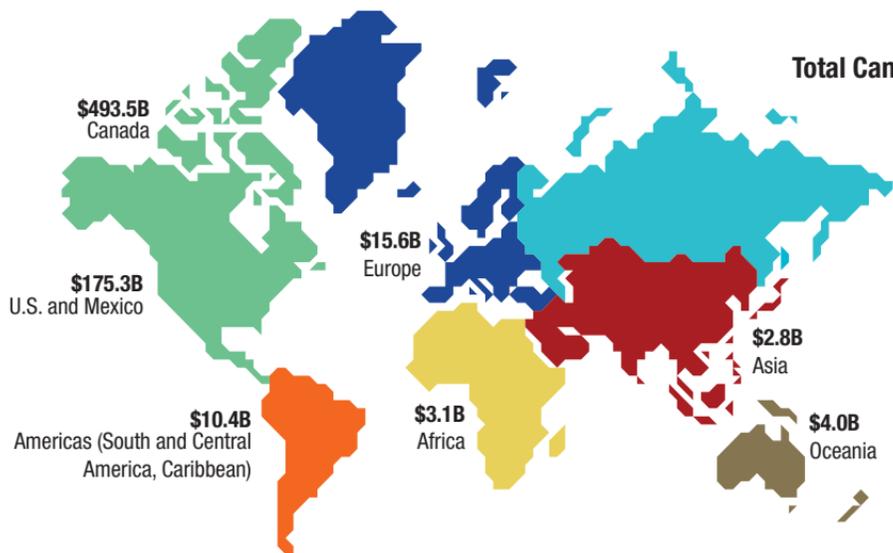
Foreign control is a measure of the extent to which foreign entities operate in Canada. Generally, a corporation is deemed to be foreign-controlled if **more than 50%** of its shares are owned by one or more foreign companies.



CANADIAN ENERGY ASSETS

The total value of Canadian* energy assets (CEA) went down in 2019 to **\$705 billion**, a slight decrease of **1.7%** from **\$717 billion** in 2018. In 2019, domestic CEAs totaled **\$493 billion**, up **2.1%** from 2018, while Canadian energy assets abroad totaled **\$211 billion**, down from **\$233 billion**.

CANADIAN ENERGY ASSETS BY REGION, 2018



Total Canadian energy assets

\$705B

Total Canadian energy assets abroad

\$211B

* A Canadian company is here defined as a publicly traded company headquartered in Canada and not foreign-controlled.

RESEARCH, DEVELOPMENT AND DEMONSTRATION

CANADIAN EXPENDITURES ON TOTAL ENERGY RD&D

In 2019-20, federal energy RD&D expenditures were **\$758 M** and provincial and territorial (P&T) government energy RD&D expenditures were **\$316 M**, for a combined total of **\$1,074 M**.



In 2019-20, federal spending increased by **12% (\$80 M increase)**, primarily driven by energy efficiency related activities. Energy efficiency increased to **\$322 M** in 2019-20, compared to **\$289 M** in 2018-19.



At COP21 in 2015, Canada joined Mission Innovation and committed to double its public investment in clean energy RD&D over five years. At the Sixth Mission Innovation Ministerial in June 2021, Canada announced that it had met its doubling pledge in clean energy RD&D by 2020, with actual spending of **\$786.8 million** in 2019-20 – exceeding its **\$775 M** target.

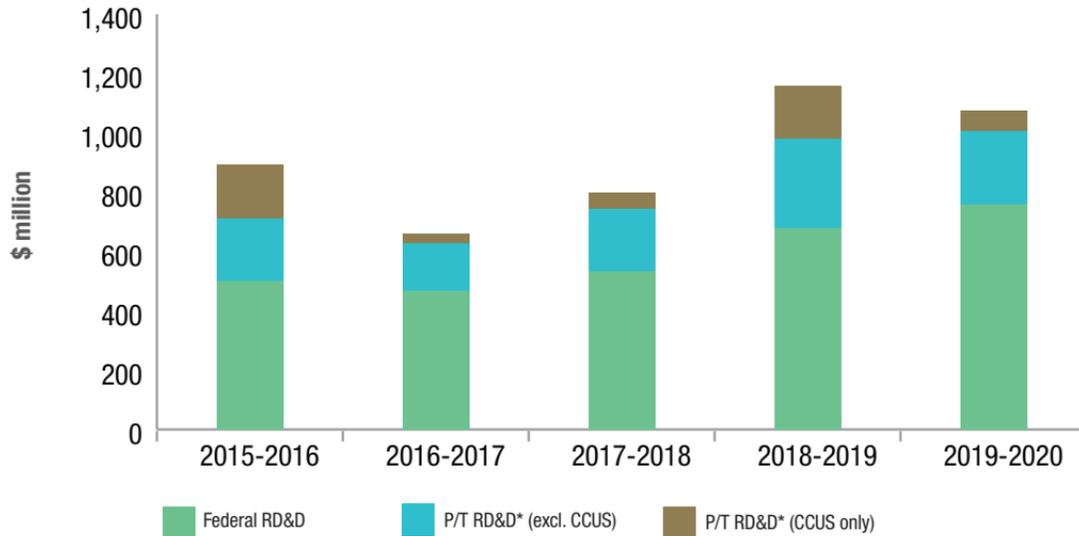


In 2019-20, P&T spending decreased by **34% (\$165 M decrease)**, mostly driven by carbon capture, utilization and storage (CCUS) related activities. CCUS spending decreased by 61% to **\$69 M** in 2019-20, compared to **\$178 M** in 2018-19.



The Canadian industry spent about **\$1.6 B** on energy R&D in 2019, similar to the spending reported in 2018.

CANADIAN PUBLIC EXPENDITURES ON ENERGY RD&D



* Provincial and territorial (P&T) includes utilities and other publicly owned entities (i.e. State-Owned Entities).

In 2019-2020, federal spending continued to increase mostly due to increased spending in energy efficiency. During the same year, P&T spending decreased significantly mostly due to decreased spending in CCUS.

EXPENDITURES ON ENERGY RD&D BY TECHNOLOGY AREA (\$ MILLIONS)



Federal
(2019/20)



**Provincial and
territorial**
(2019/20)



Industry
(2019)



Hydrocarbons
(including CCUS)

121

125

684



**Renewable and
non-emitting
energy****

276

145

524



Energy end use***

360

46

435

Total*

758

316

1,643

* Totals may not be exact due to rounding.

** Renewable and non-emitting energy includes renewable and nuclear energy.

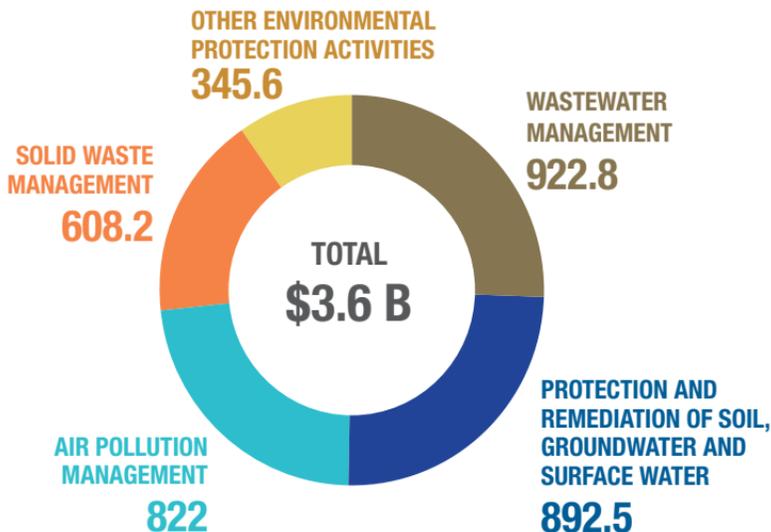
*** Energy end use includes energy efficiency related to transport, industry, and buildings & communities.

ENVIRONMENTAL PROTECTION EXPENDITURES

Environmental protection expenditures (operating and capital spending combined) by the energy sector totalled **\$5 billion** in 2018, representing **52%** of expenditures made by all industries.

The oil and gas sector (\$3.6 billion) accounts for the largest share of those expenditures, slightly more than one-third (37%) of total environmental protection expenditures made by all industries.

OIL AND GAS EXTRACTION EXPENDITURES PER ENVIRONMENTAL ACTIVITY (2018, \$ MILLIONS)



- Electric power generation, transmission and distribution invested **\$691 million** on environmental protection measures.
- Petroleum and coal product manufacturing invested **\$450 million** in environmental protection activities, the largest percentage of spending (92%) in pollution abatement and control.

ENERGY SECTOR DEMOGRAPHICS (2019)

Women held 31% of energy sector jobs.

Over two-thirds (69%) of employees in the energy sector had more than a high school education and **52%** of workers had a **college diploma or university degree**.

Over the last decade, the workforce in the energy sector has become **increasingly diverse**. In 2019, **18%** of the workforce identified as members of a visible minority group, up from **14%** in 2009.

5% of energy sector employees identified as **Indigenous**.

The workforce in the energy sector has been **aging over time**. In 2019, the proportion of employees aged 55 years and older stood at 21%, **up from 14%** in 2009.

Immigrant workers represented **29%** of energy sector employees compared to 25% in the total economy.

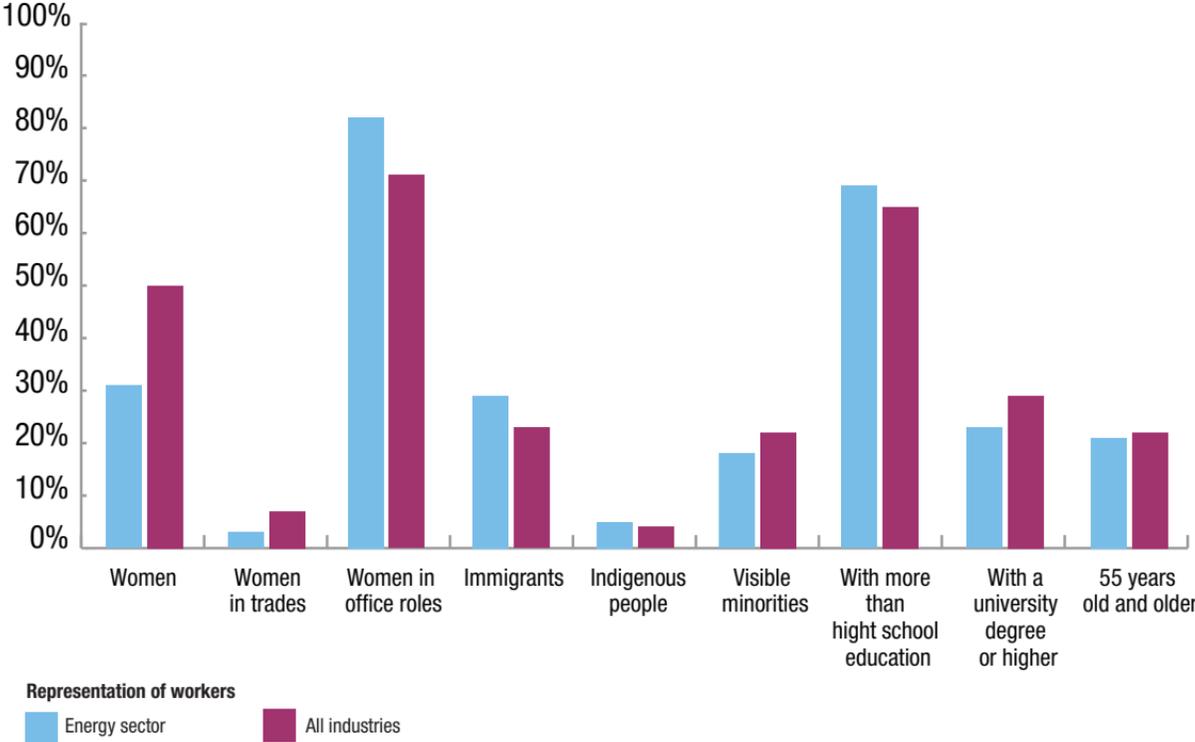


- Energy sector jobs paid an average of **\$112,706 per year**, while the average Canadian job paid **\$56,783**.
- The **gender wage gap** closed slightly in the energy sector in 2019, with women earning on average **91%** of the hourly wage earned by men. In contrast, in 2009, women earned on average **84%** of the hourly wages earned by men.

- Jobs requiring a **university degree** had the highest compensation, reaching **\$147,195**.
- Among **occupation types**, women in the energy sector are highly represented in office roles (administrative, general office worker, and auditor accountants and investment professionals) at **82% of these occupations**. Men are highly represented in trades (holding 97% of these occupations).
- Conversely, women in the trades earn on average **128%** of the hourly wage earned by men, while those working in administrative occupations earn on average **67%** of the hourly wage earned by men.



Representation of demographic groups in the energy sector compared to all industries



ENERGY AFFORDABILITY

In 2019, in-home energy expenditure by Canadian households averaged **\$2,102**. This represented 3% of the average disposable income.

When households spend 10% or more of their income on energy needs, this is referred to as **energy poverty**.

Overall, 6% of Canadian households spent 10% or more of their income on energy. This share varies considerably across regions and income levels.

Energy poverty rates, by income quintile and geography						
	Q1 (Lowest)	Q2	Q3	Q4	Q5 (Highest)	Average
Canada	21%	6%	2%	0%	0%	6%
Atlantic Provinces	49%	19%	4%	0%	0%	15%
Que.	17%	4%	1%	0%	0%	4%
Ont.	20%	5%	0%	0%	0%	5%
Man.	21%	7%	1%	0%	0%	6%
Sask.	34%	8%	2%	0%	0%	9%
Alta.	23%	3%	1%	0%	0%	5%
B.C.	25%	4%	1%	0%	0%	6%

Energy poverty rates are based on the number of energy poor households divided by total households for a given income quintile and region.

Energy, in this context, includes what is needed inside the home (i.e. space heating, appliances), and excludes transportation.

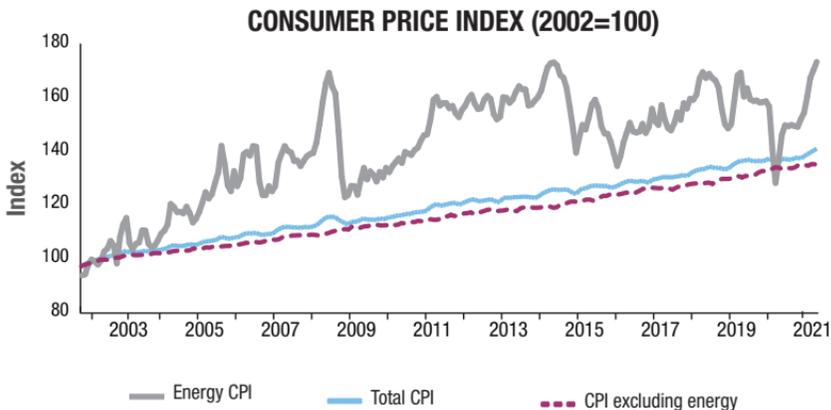
HOUSEHOLD EXPENDITURES ON ENERGY



- Canadian households **spent \$4,524** on average on energy in 2019.
- Residential expenditures, including for heating/cooling spaces, lighting and operating appliances, averaged **\$2,102**.
- Transportation expenditures averaged **\$2,422**.
- Energy accounted for **6.6%** of current household consumption. Lower-income households spend a larger share of their disposable income on energy.

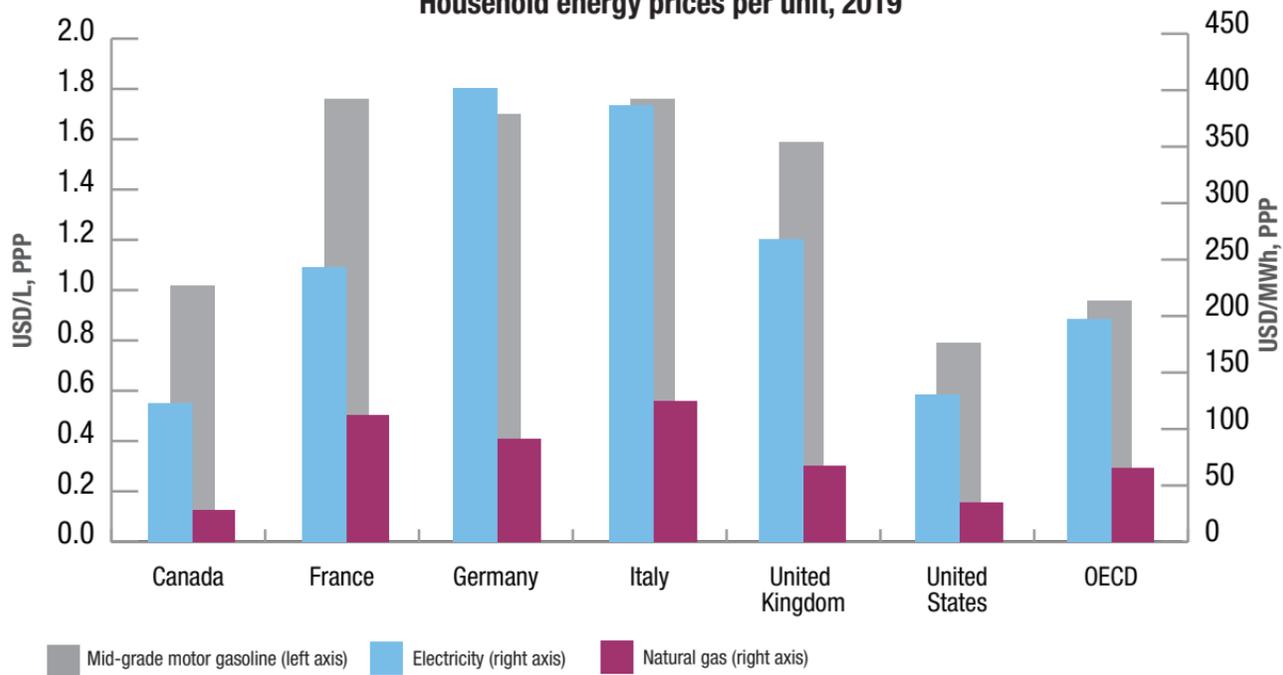
ENERGY RETAIL PRICES

- The “energy” component of the consumer price index (CPI) has been volatile in recent years.
- This volatility reflects mostly the variations of upstream oil and gas prices and their impact on consumer products such as gasoline.



**IN COMPARISON WITH OTHER DEVELOPED ECONOMIES,
CANADA'S ENERGY PRICES ARE RELATIVELY LOW.**

Household energy prices per unit, 2019

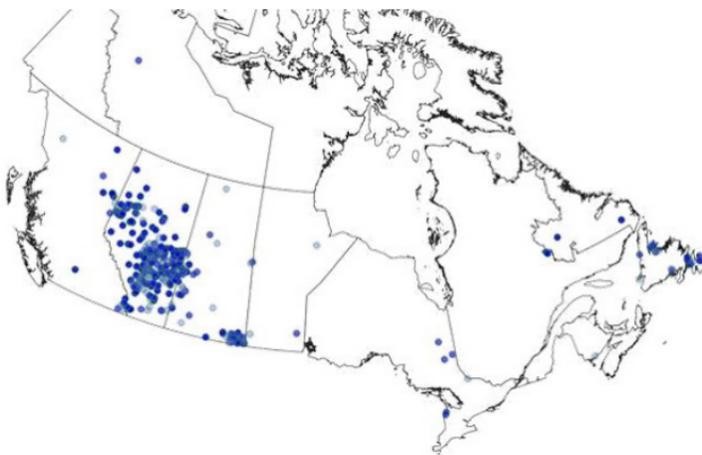
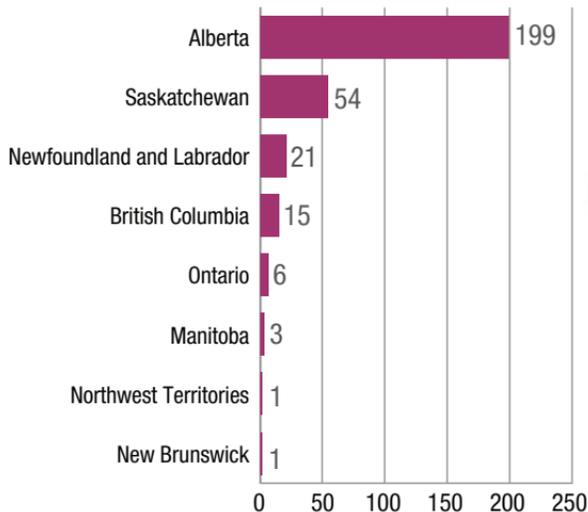


ENERGY RELIANT COMMUNITIES

Communities that have higher shares of employment from a specific sector, a relatively high share of total income from that sector, and relatively low sectoral diversity in their economy compared to the average Canadian community can be described as reliant on that sector.

There are **300 communities across Canada that are at least moderately reliant** on the energy sector. Of these communities, **79% are rural or remote**.

Distribution of energy reliant communities across Canada

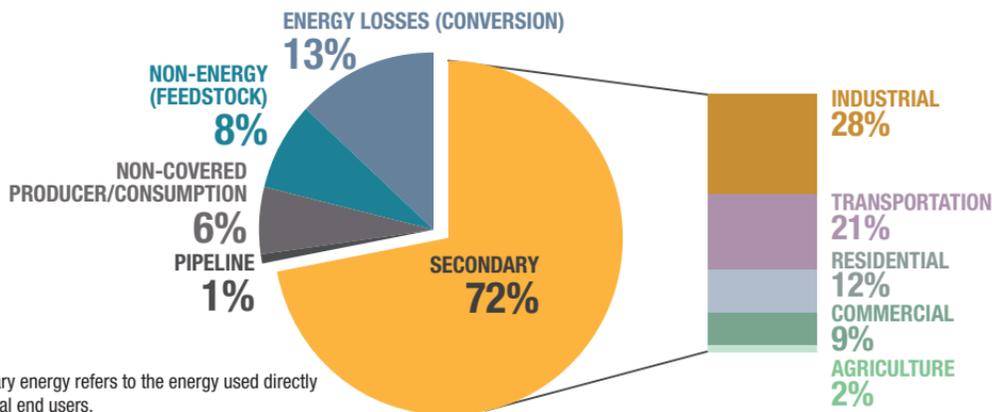


ENERGY USE

PRIMARY AND SECONDARY ENERGY USE BY SECTOR (2018)

- Primary energy use measures the total energy requirements of all energy users.
- Secondary energy use accounts for the energy used by final consumers in the economy.
- Primary energy use includes secondary energy use. Additionally, primary energy use includes the energy required to transform one form of energy into another (e.g. coal to electricity); the energy used to bring energy supplies to the consumer (e.g. pipeline); and the energy used to feed industrial production processes (e.g. the natural gas used as feedstock by the chemical industries).
- Not every fuel is consumed as energy. For example, hydrocarbon gas liquids in Canada are also used as a non-energy feedstock in the petrochemical industry.
- Canada's primary energy consumed was estimated at **13,486 PJ**.

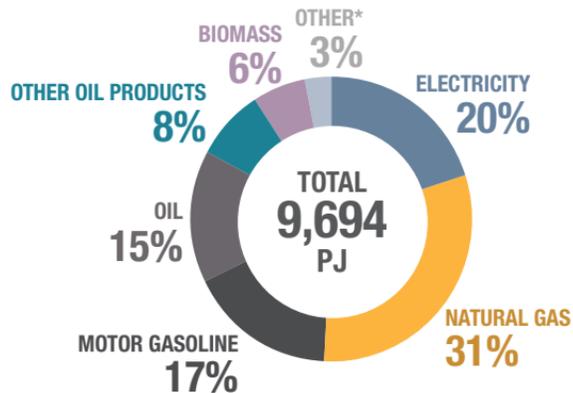
PRIMARY AND SECONDARY ENERGY USE BY SECTOR, 2018



*Secondary energy refers to the energy used directly by the final end users.

- Secondary energy use includes the energy used to run vehicles; the energy used to heat and cool buildings; and the energy required to run machinery.
- Canada's secondary energy use in 2018 was **9,694 PJ**.
- Total secondary energy use **increased 19%** from 2000 to 2018. Natural gas usage grew by **39%** while electricity usage increased 19%, during the same period.

CANADA'S SECONDARY ENERGY USE BY FUEL TYPE, 2018



* "Other" includes coal, coke, coke oven gas, NGLs and steam and waste.

ENERGY IN OUR DAILY LIVES

Canadian households use energy every day – to power lights and appliances, heat or cool spaces, run personal vehicles, recharge electronics and more.

- **81%** of residential energy consumption is used for space and water heating.
- Residential energy efficiency improved by **28%** between 2000 and 2018, **saving 412 PJ** of energy and **\$7.8 billion in energy costs**.

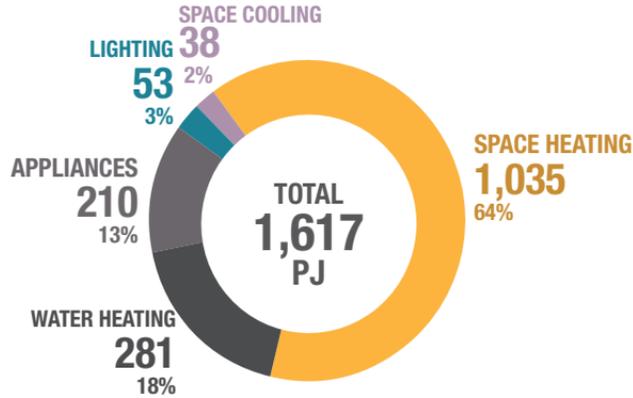
**Residential energy
use increased**



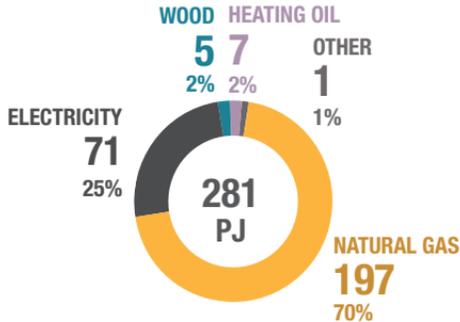
but would have increased by



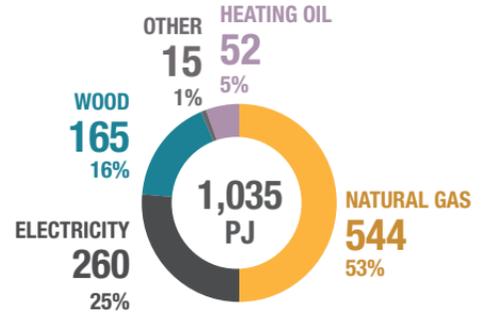
RESIDENTIAL ENERGY USE, BY TYPE (PJ), 2018



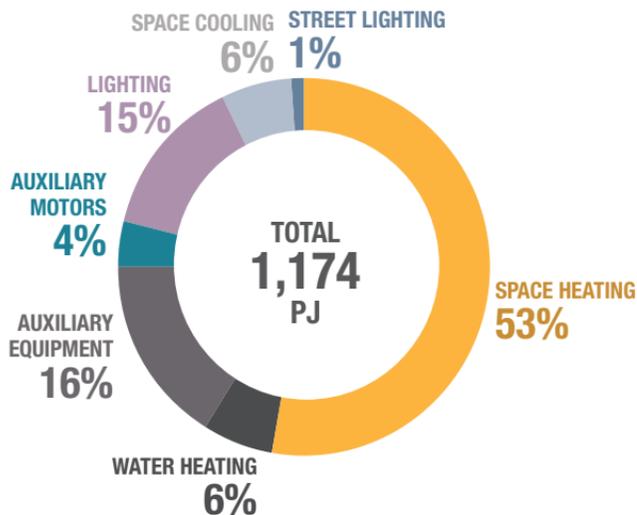
WATER-HEATING ENERGY USE (PJ), 2018



SPACE-HEATING ENERGY USE (PJ), 2018



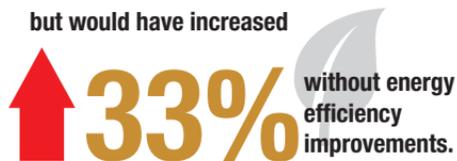
COMMERCIAL AND INSTITUTIONAL ENERGY USE BY END USE, 2018



Commercial and institutional energy use increased between 2000 and 2018



but would have increased

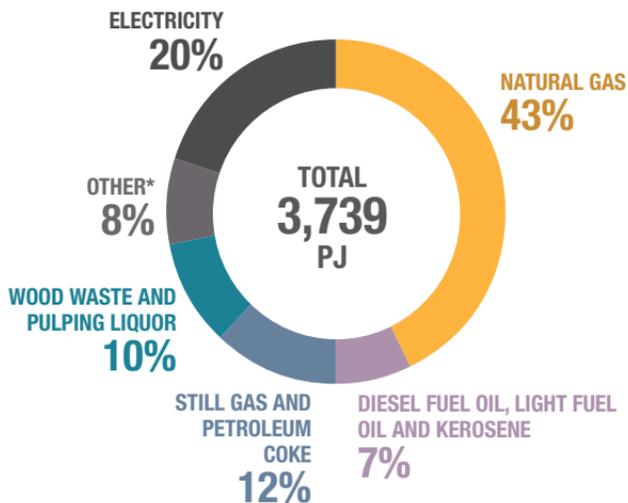


Energy intensity (GJ/m²) decreased



Since 2000, energy efficiency in the commercial and institutional sector has **improved 15%**, saving 143 PJ of energy and **\$3.4 billion** in energy costs in 2018.

INDUSTRIAL SECTOR ENERGY USE BY FUEL TYPE, 2018



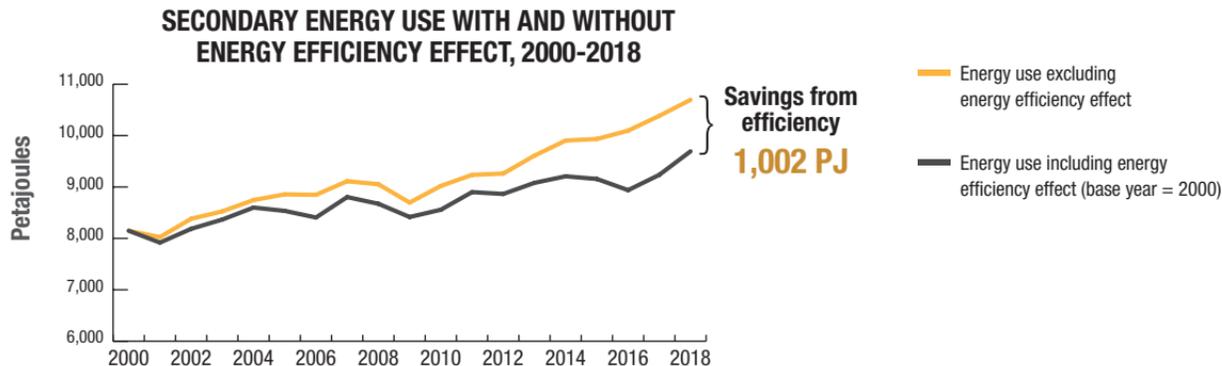
- The **industrial sector** includes all manufacturing, mining (including oil and gas extraction), forestry and construction activities.
- From 2000 to 2018, **industrial energy use increased 18%**. Energy use in resource extraction industries increased nearly threefold over the same period.
- Excluding resource extraction industries, **energy efficiency improvements of 9%** in the industrial sector resulted in **savings of 241 PJ** and **\$2.7 billion** in energy costs in 2018.

* "Other" includes HFO, coke and coke oven gas, coal, LPGs, NGLs, steam and waste.

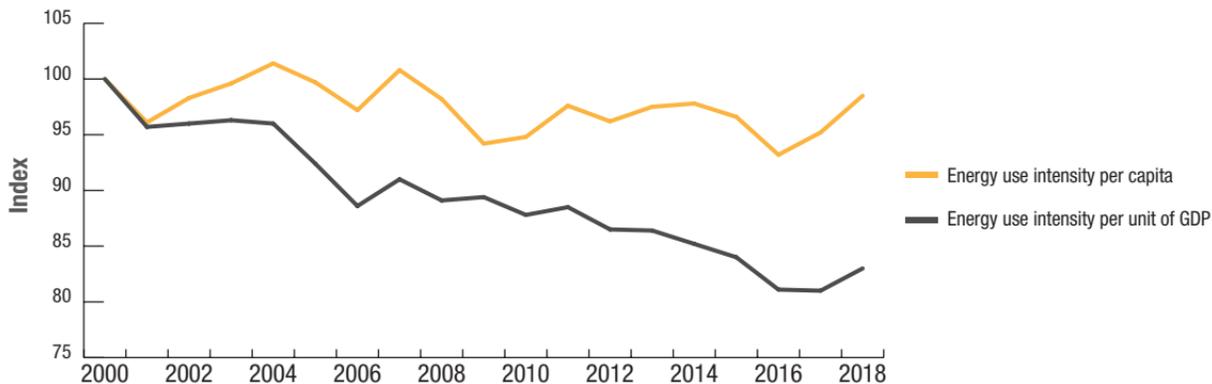
EFFICIENCY TRENDS

HISTORICAL ENERGY EFFICIENCY

- **Energy efficiency** is a measure of how effectively energy is used for a given purpose and is an important path toward decarbonization.
- **Energy intensity** is the ratio of energy use per unit of activity (such as floor space and GDP).
- **Efficiency improvements** slow the rate of growth in energy use.
- **Energy efficiency** in Canada **improved by 12%** between 2000 and 2018.
- **Energy use grew by 19%** between 2000 and 2018. Without energy efficiency improvements, energy use would have **grown by 31%**.
- **Energy efficiency savings** of **1,002 PJ** in 2018 were equivalent to end-user savings of **\$26 billion**.



INDEXED TOTAL SECONDARY ENERGY USE INTENSITY PER CAPITA AND PER UNIT OF GDP, 2000–2018 (2000=100)



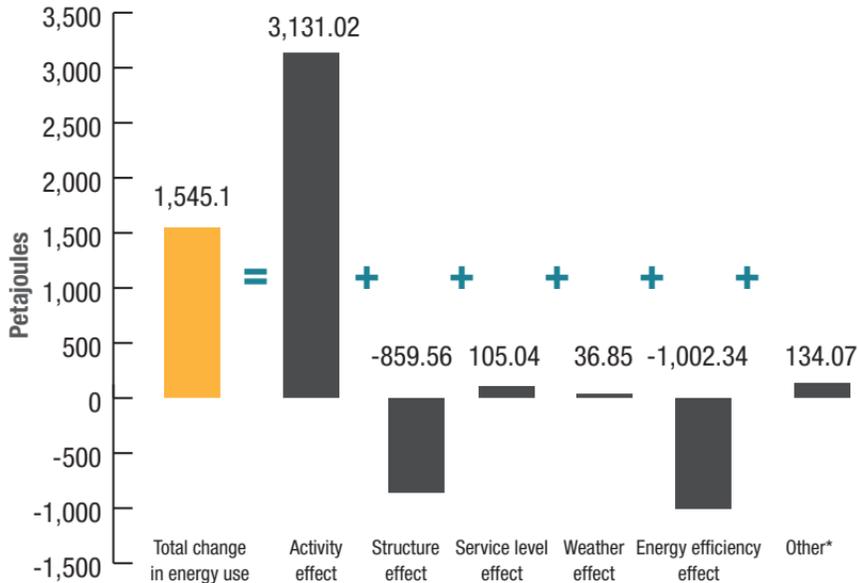
Per capita energy consumption was

2% lower in 2018 than in 2000.

Canada used

17% less energy per dollar of GDP in 2018 than in 2000.

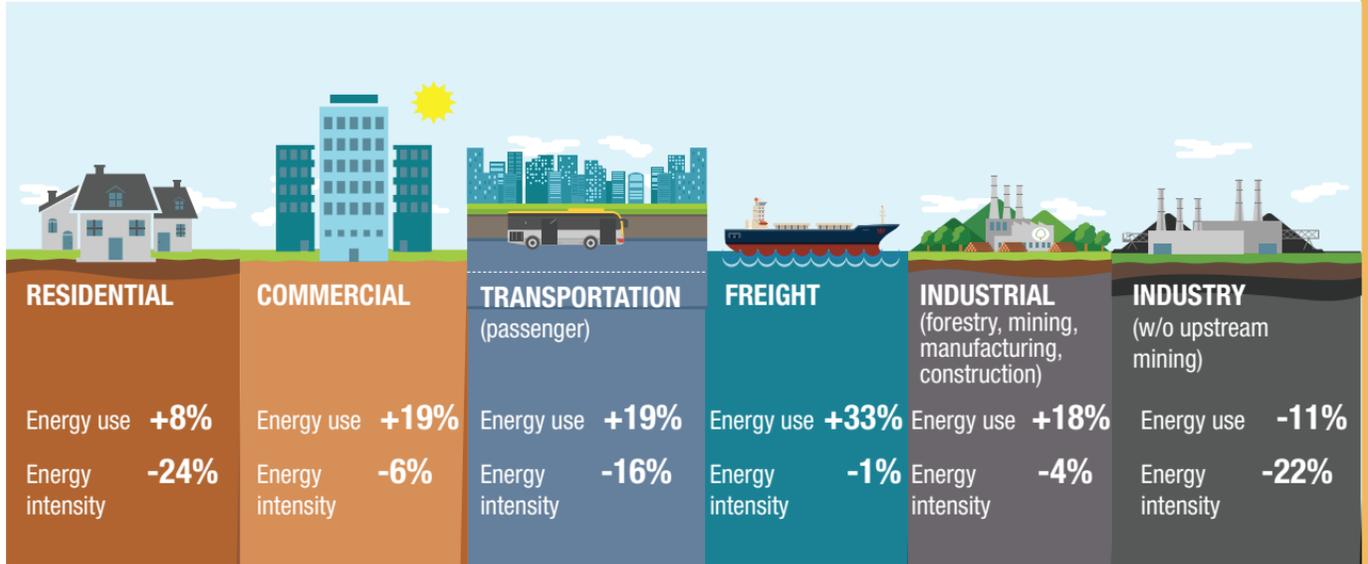
SUMMARY OF FACTORS INFLUENCING THE CHANGE IN ENERGY USE, 2000-2018



- **Activity:** major drivers of energy use in a sector (e.g. floor space area in the commercial/institutional sector)
- **Structure:** refers to change in the makeup of each sector
- **Service level:** increased penetration of auxiliary equipment in commercial/institutional buildings
- **Energy efficiency:** how effectively energy is being used for a given purpose. For example, providing a similar (or better) level of service with less energy consumption on a per unit basis is considered an improvement in energy efficiency.

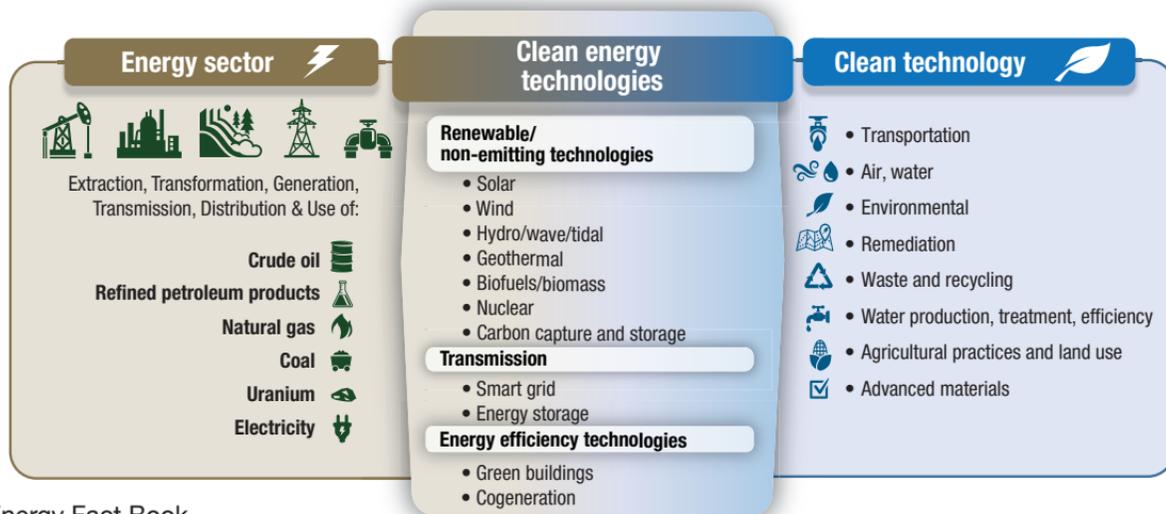
* "Other" refers to street lighting, non-commercial airline aviation, off-road transportation and agriculture, which are included in the "Total change in energy use" column but are excluded from the factorization analysis.

TRENDS IN ENERGY USE AND INTENSITY BY SECTOR, 2000-2018



CLEAN TECHNOLOGY AND THE ECONOMY

- In 2017, the Government of Canada invested in a Clean Technology Data Strategy to provide the foundation for measuring the economic, environmental and social impacts of clean technology in Canada.
- As part of this strategy, Statistics Canada has developed the Environmental and Clean Technology Products Economic Account (ECTPEA), which provides a comprehensive picture of the state of Canada's clean technology economy for the years from 2007 to 2019.
- The ECTPEA includes processes, products and services that reduce environmental impacts through environmental protection and resource management activities and the use of goods that have been adapted to be significantly less energy- or resource-intensive than the industry standard.



Environmental and clean technology (2019):

\$70.5 billion of GDP
(3% of total GDP)

341,000 jobs representing
1.8% of jobs in the Canadian economy

\$13.5 billion in exports

Of this, clean energy alone accounted for

1.7% of Canada's GDP

and employed

118,724 people.

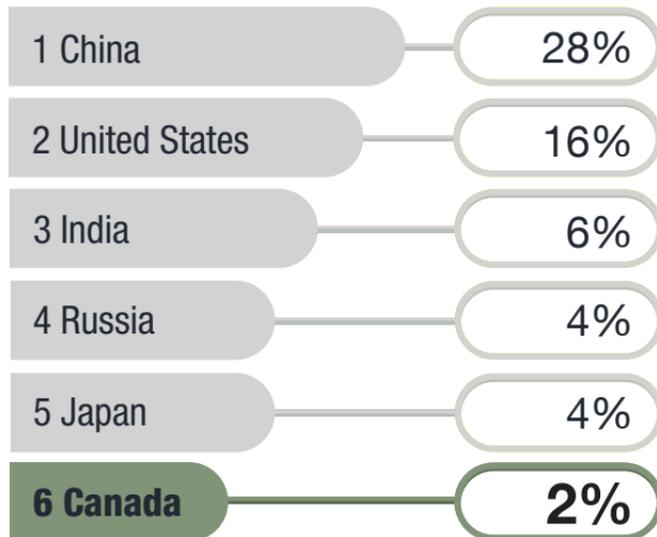


The TSX and TSX-Venture exchanges list **90 companies in the cleantech sector**, with a total market capitalization of **\$89.2 billion**. Of those companies, 78 are headquartered in Canada, with a total market capitalization of **\$77.7 billion** (as of June 30, 2021).

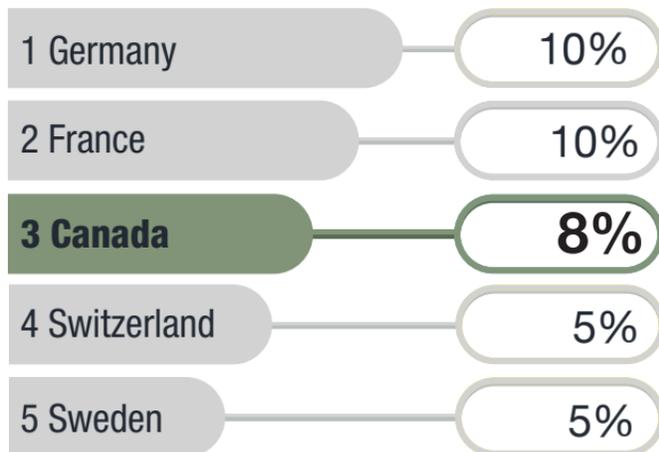
ELECTRICITY

INTERNATIONAL CONTEXT

World production – 27,044 TWh (2019)



World exports – 724 TWh (2019)



TRADE (2020)

All Canadian electricity trade is with the U.S.

EXPORTS



67.2 TWh

IMPORTS



9.8 TWh

CANADA'S ELECTRICITY TRADE WITH THE U.S.*

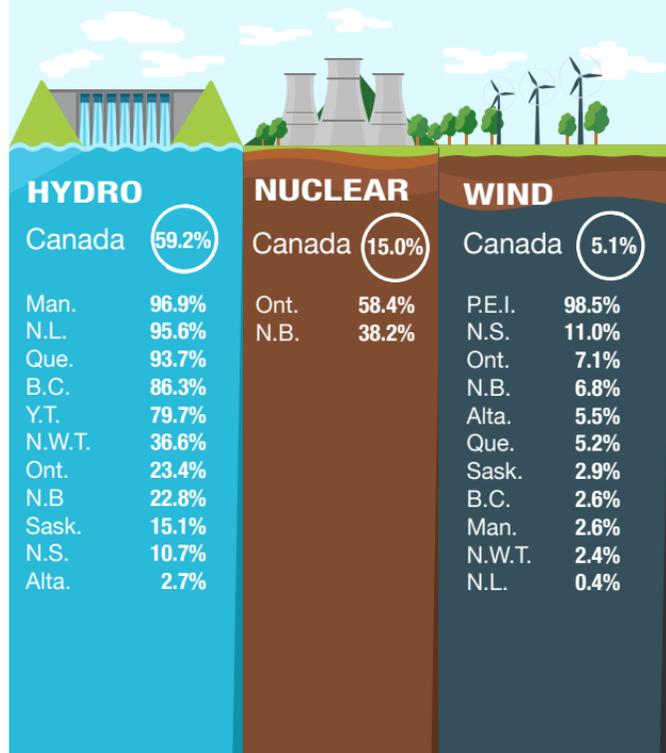
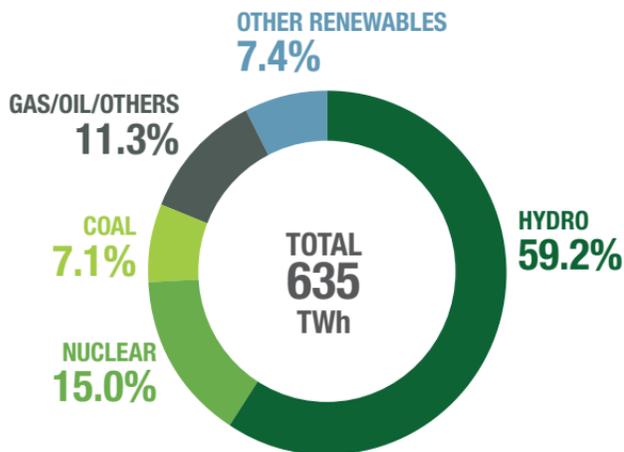


* includes only electricity traded under purchased contracts; excludes electricity transferred under non-financial agreements (e.g. under treaty obligations)

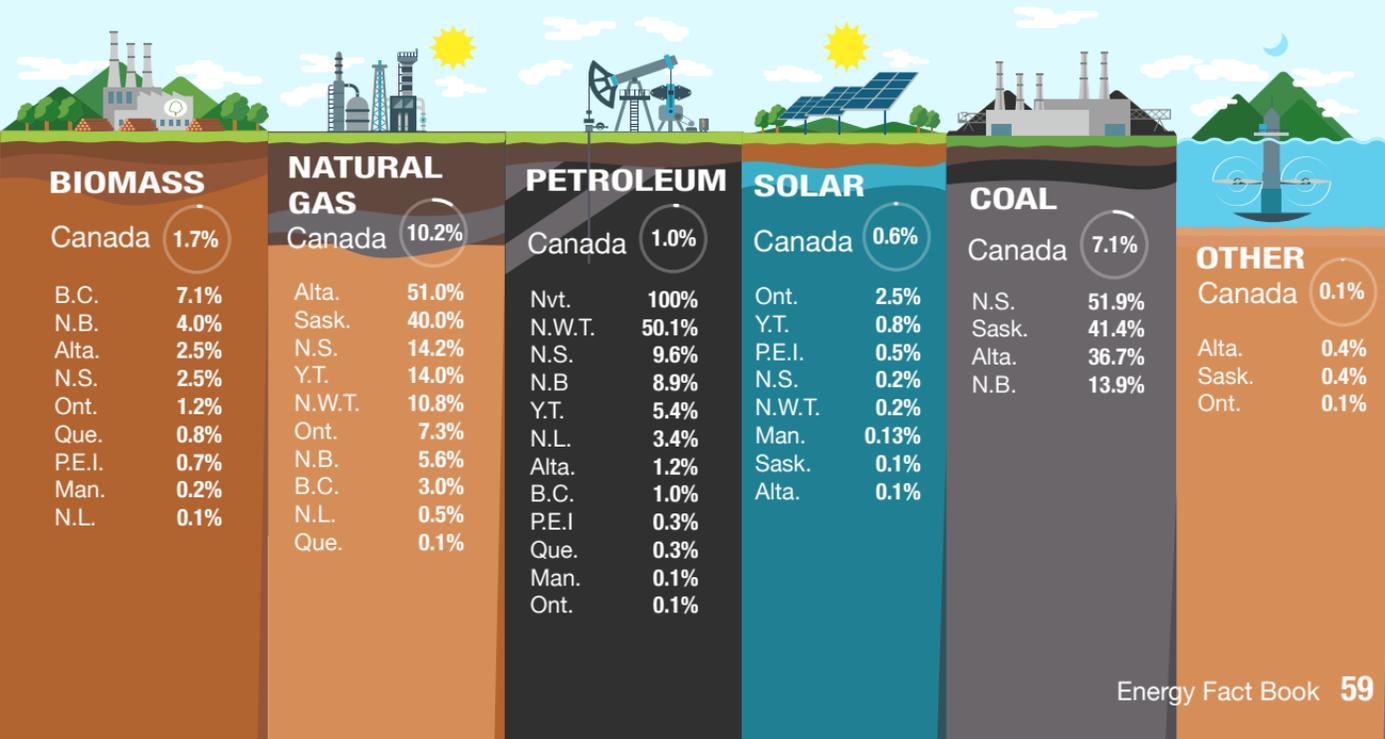
CANADIAN SUPPLY

GENERATION IN CANADA – 635 TWh

GENERATION BY SOURCE, 2019



PROVINCIAL ELECTRICITY GENERATION BY SOURCE, 2019



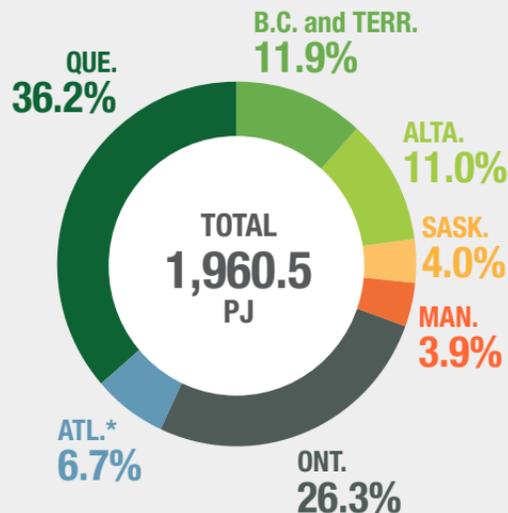
ELECTRICAL ENERGY USE

TOTAL ELECTRICAL ENERGY USE* WAS 1,960.5 PJ IN 2018

Sector	Energy use (PJ)	% of the total
Residential	621.3	31.7%
Commercial	538.9	27.5%
Industrial	758.9	38.7%
Transportation	4.4	0.2%
Agriculture	37.0	1.9%
Total	1,960.5	100%

*secondary energy use

ELECTRICAL ENERGY USE BY PROVINCE, 2018

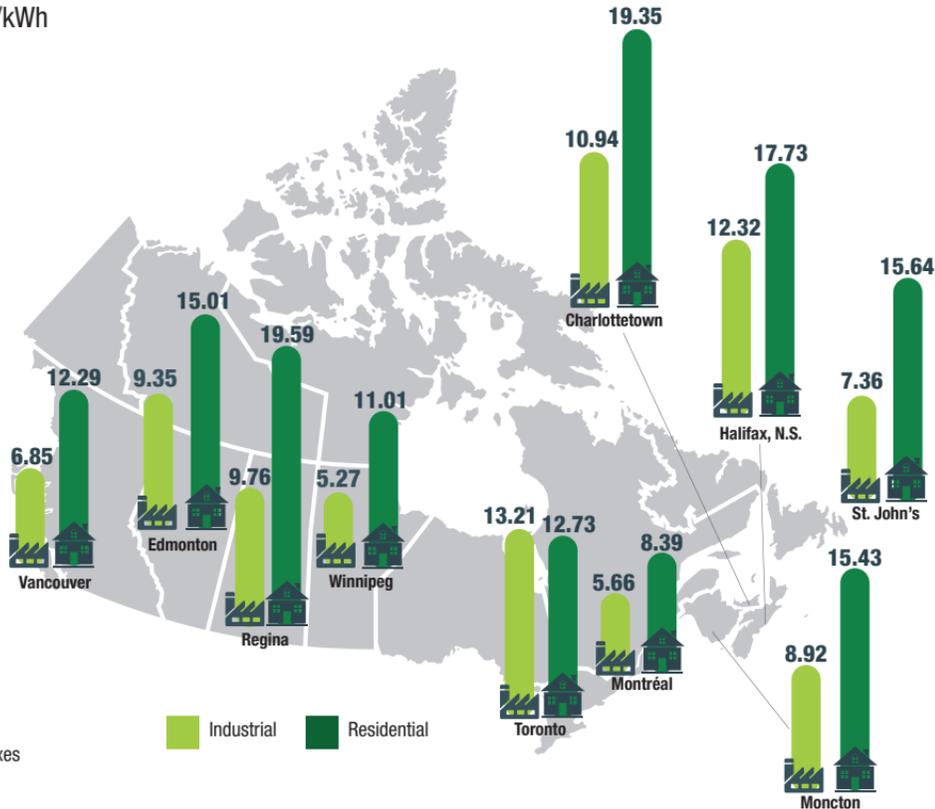


* Atlantic provinces

ELECTRICITY PRICES

AVERAGE LARGE INDUSTRIAL AND RESIDENTIAL ELECTRICITY PRICES* (AS OF APRIL 2020)

in cents/kWh

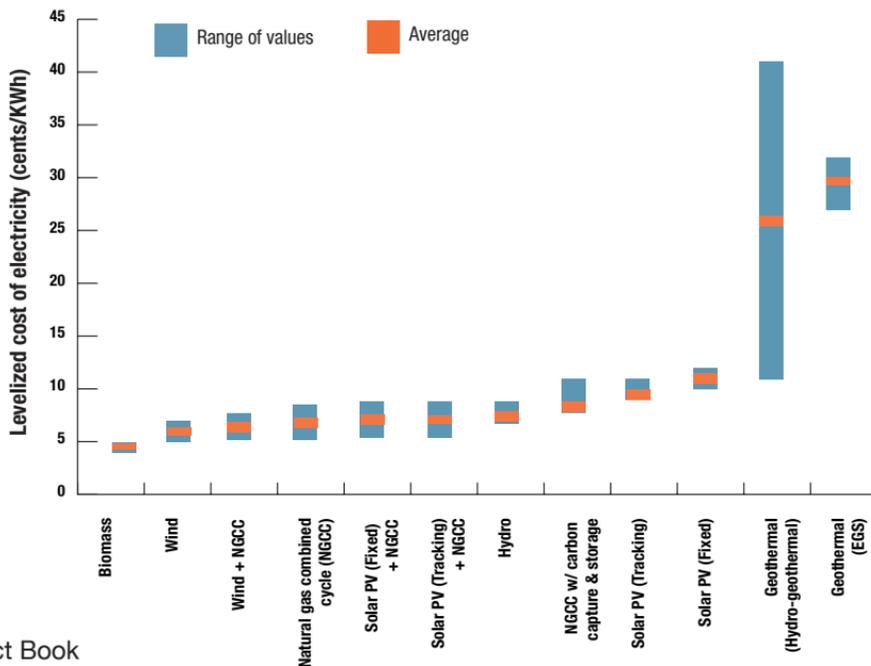


*including taxes

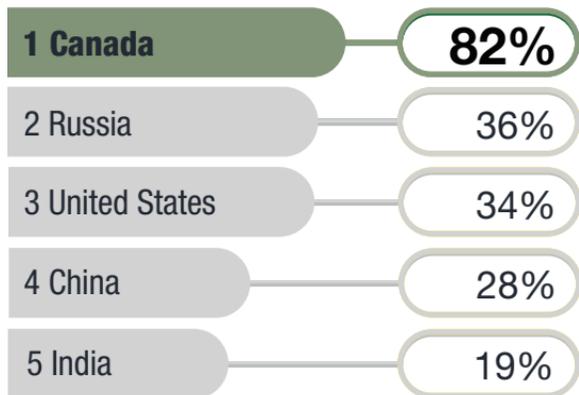
LEVELIZED COST OF ELECTRICITY

One measure used to directly compare costs between generation technologies is the levelized cost of electricity (LCOE). This is the average price an electricity generator must receive for each unit it generates over its lifetime to break even financially.

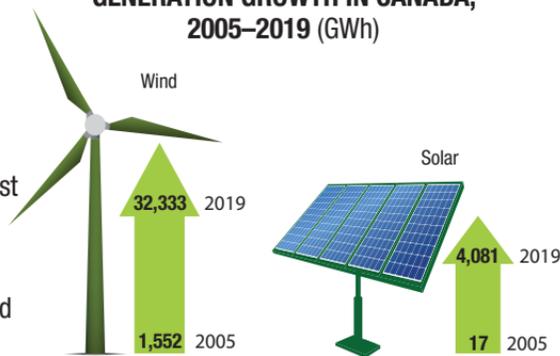
Over the past several years, various groups have conducted analysis of LCOE for energy sources in Canada, including the [Canada Energy Regulator](#) as well as the Canadian Energy Research Institute whose results are presented below. Results can vary depending on methodology, scope and inputs used.



PERCENTAGE OF TOTAL ELECTRICITY FROM NON-EMITTING SOURCES FOR THE TOP FOUR ELECTRICITY-GENERATING COUNTRIES AND CANADA



WIND AND SOLAR NET ELECTRICITY GENERATION GROWTH IN CANADA, 2005–2019 (GWh)



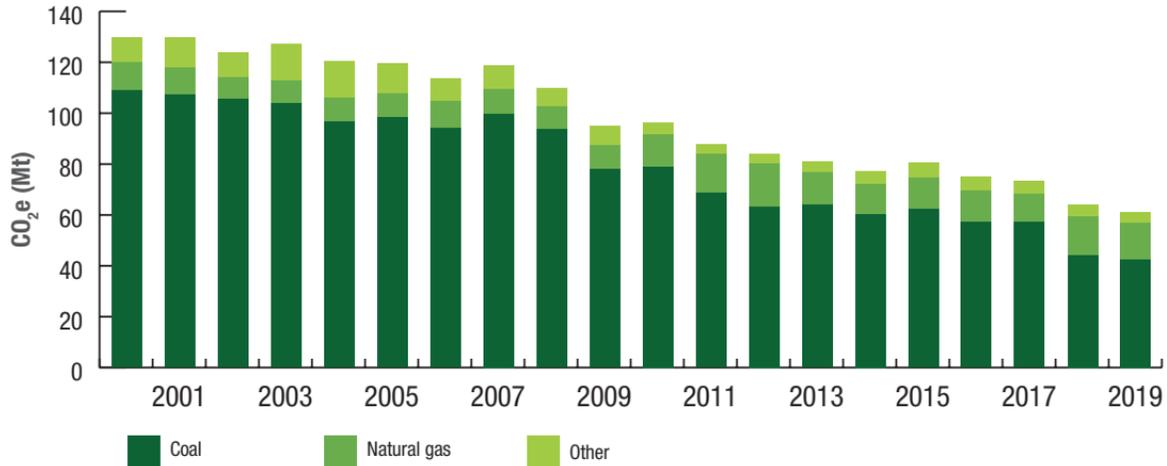
- **Renewable electricity generation has increased 18%** between 2010 and 2019, with solar and wind having the largest growth.
- In 2019, **82% of electricity in Canada** came from non-GHG emitting sources. **Hydro** made up **59%**, **nuclear was 15%**, and other renewables were the remaining **7%**.

GHG SPOTLIGHT: ELECTRICITY

Total electricity emissions **decreased by 53%** from 2000 to 2019 because of increased generation from non-emitting sources.

Coal-fired electricity generation accounted for **7% of generation** and **70% of electricity-related GHG emissions** in 2019.

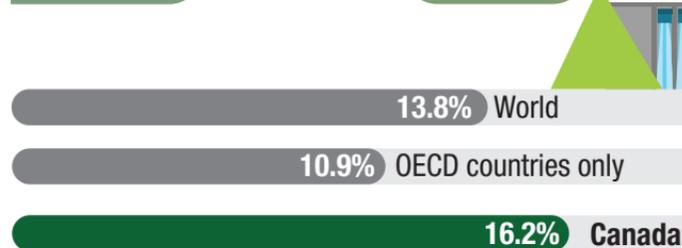
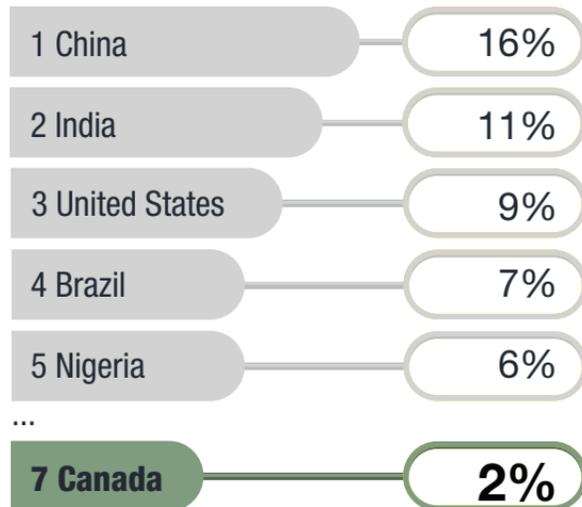
ELECTRICITY SECTOR GHG EMISSIONS FOR CANADA, 2000–2019



RENEWABLE ENERGY

INTERNATIONAL CONTEXT

World production – 88,996 PJ or 1,988 MTOE (2019)

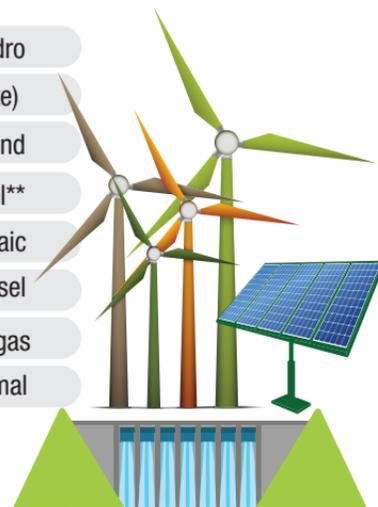
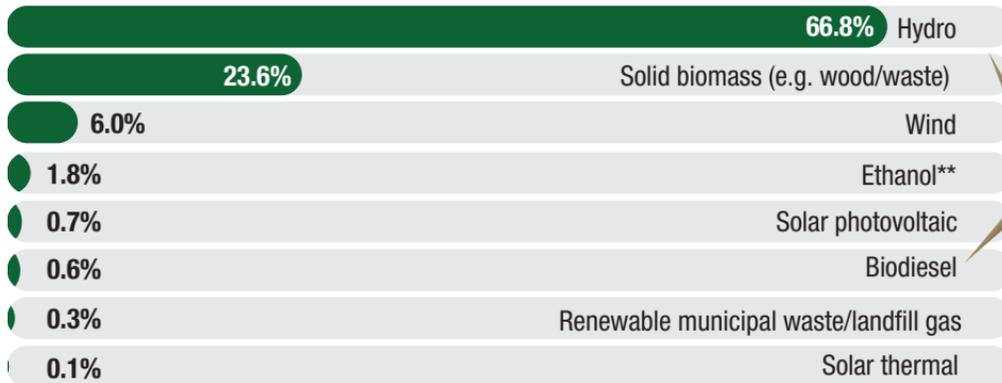


Share of energy supply from renewable sources (2019)



CANADIAN PRODUCTION (2019)

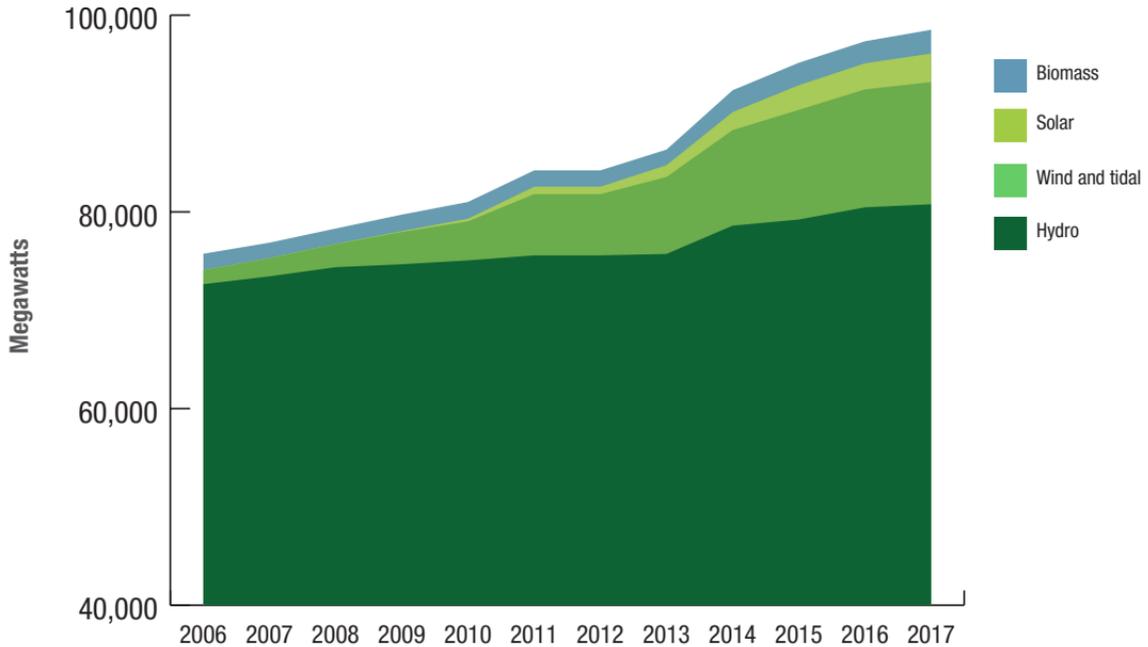
Total renewable energy* – 2,047 PJ or 49.1 MTOE



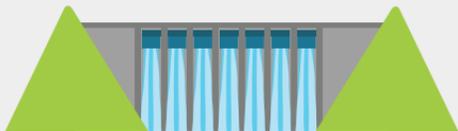
*includes energy consumed for electricity and heat production and for biofuels in the transportation sector

**is a biogasoline

CANADIAN RENEWABLE ELECTRICITY GENERATING CAPACITY



HYDROELECTRICITY



Moving water is the most important renewable energy source in Canada, providing **59%** of Canada's electricity generation. In fact, in 2019, Canada was the third-largest producer of hydroelectricity in the world.

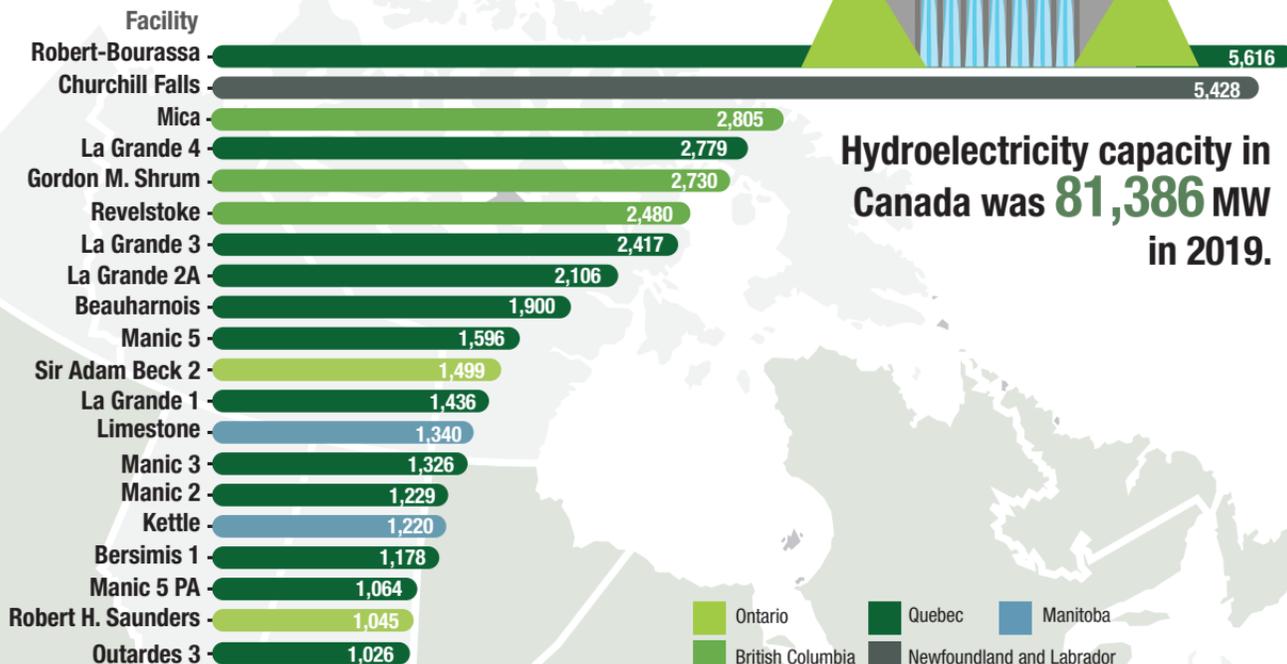
INTERNATIONAL CONTEXT

World generation of hydroelectricity – 4,221 TWh
(2019)



HYDROELECTRICITY CAPACITY IN CANADA

MAJOR HYDRO FACILITIES IN CANADA* ($\geq 1,000$ MW)



Hydroelectricity capacity in Canada was **81,386 MW** in 2019.

*There are 595 facilities with a capacity of at least 1 MW and 13 facilities with less than 1 MW of capacity, for a total of 608 facilities.

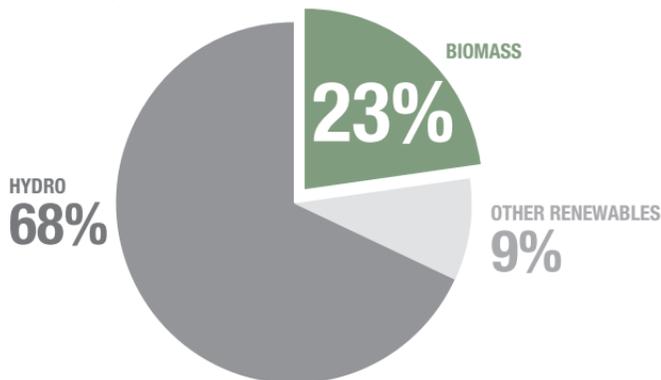
BIOMASS

- Biomass is a renewable energy resource derived from living organisms and/or their by-products.
- In 2018 there were **36 operational** co-generation units at pulp and paper mills and **41 Independent Power Providers (IPP)** using biomass.
- Electrical capacity of pulp and paper co-generation was **3,427 MW**, while heat capacity was **1,348 MW**. IPP capacity for electricity and heat was **794 MW** and **400 MW**, respectively.
- In 2017, there were also **351 bioheat projects**, of which **82%** are less than **1 MW**. Institutions, including schools and hospitals, are the strongest market for bioheat in Canada.

Biomass accounts for the **largest share of renewable energy production** in the OECD, at

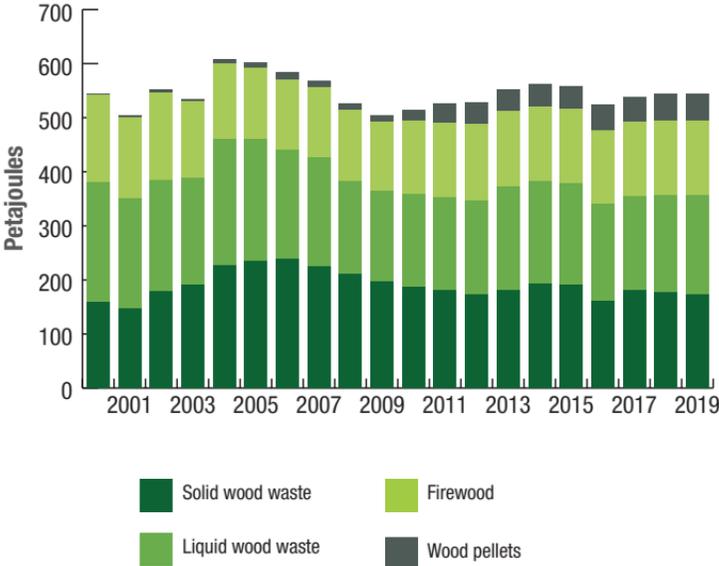


In Canada, that share is

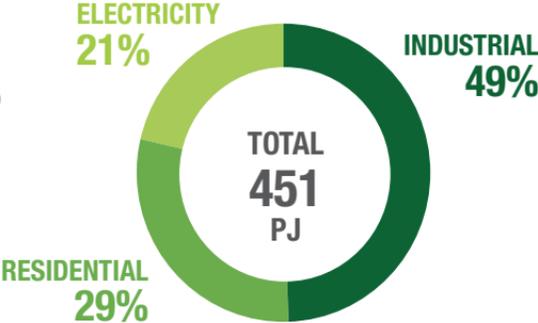


CANADIAN PRODUCTION

CANADIAN PRODUCTION OF BIOMASS, 2019



WOOD FUEL USE BY SECTOR, 2019

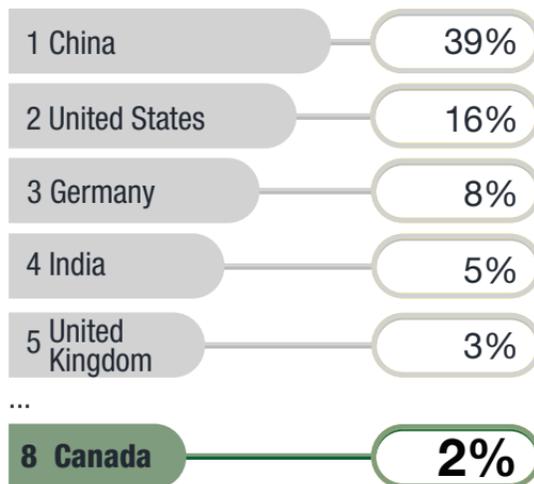


WIND POWER

- Electricity from wind energy is one of the **fastest growing sources** of electricity in the world and in Canada.
- Wind accounts for **5.1%** of electricity generation in Canada in 2019.

INTERNATIONAL CONTEXT

World capacity of wind power – 742,689 MW
(2020)



WIND POWER IN CANADA

Capacity (2020):

13,588 MW

more than
tripled



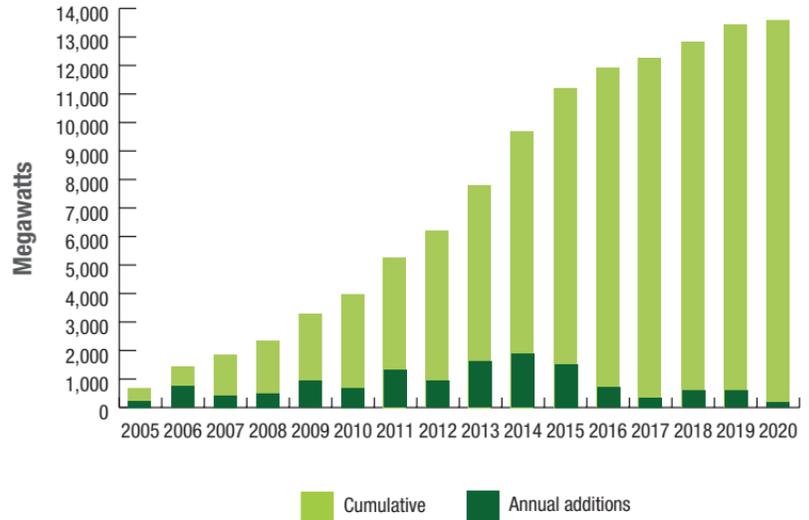
Generation (2019):

32.3 TWh

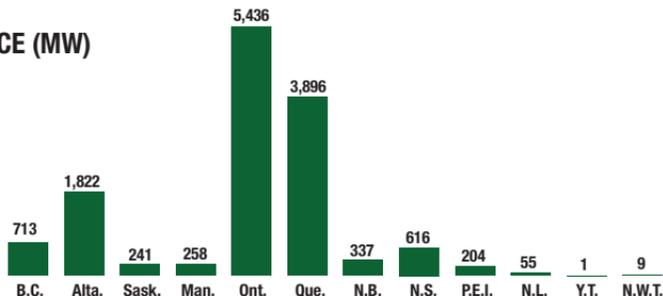
almost
quadrupled



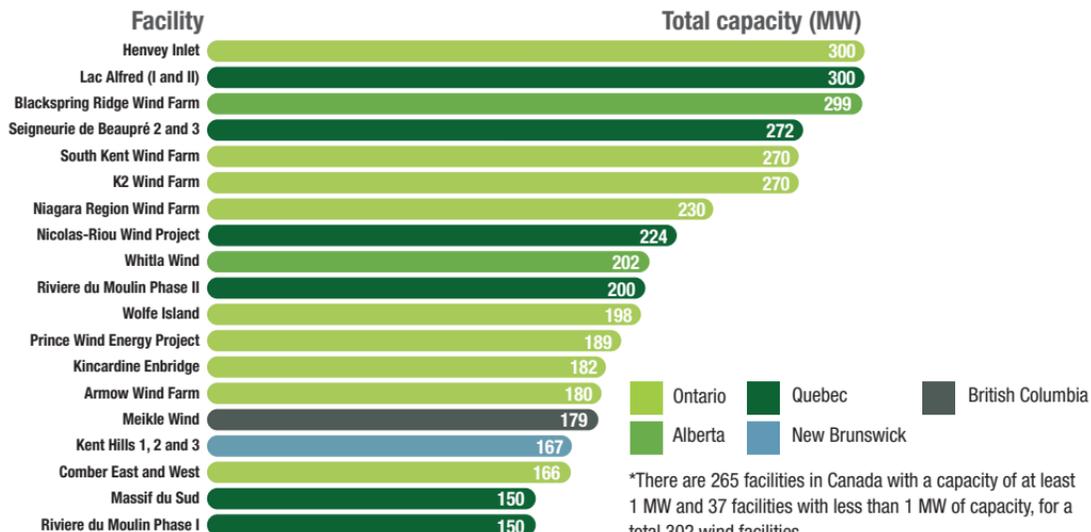
INSTALLED CAPACITY



CAPACITY BY PROVINCE (MW)



LARGEST WIND FARMS IN CANADA* (≥ 150 MW)

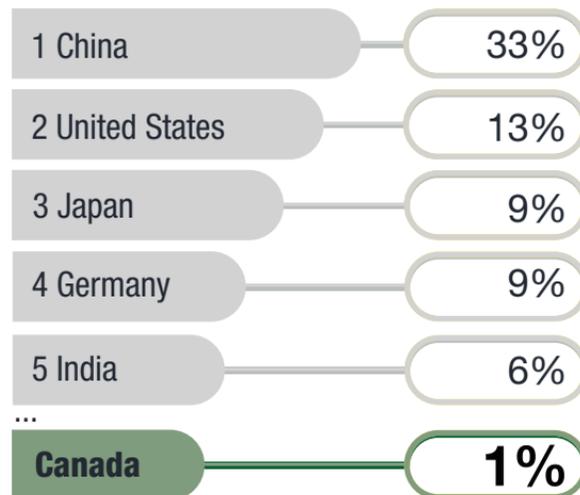


SOLAR PHOTOVOLTAIC

- Solar power is the conversion of energy from sunlight into electricity. Solar PV is rapidly becoming an economical, renewable technology to harness renewable energy from the sun.

INTERNATIONAL CONTEXT

World capacity of solar PV – 759 GW (2020)

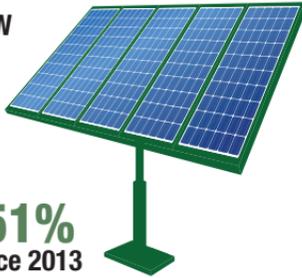


SOLAR PV IN CANADA

Capacity (2019):

3,273 MW

up **151%**
since 2013



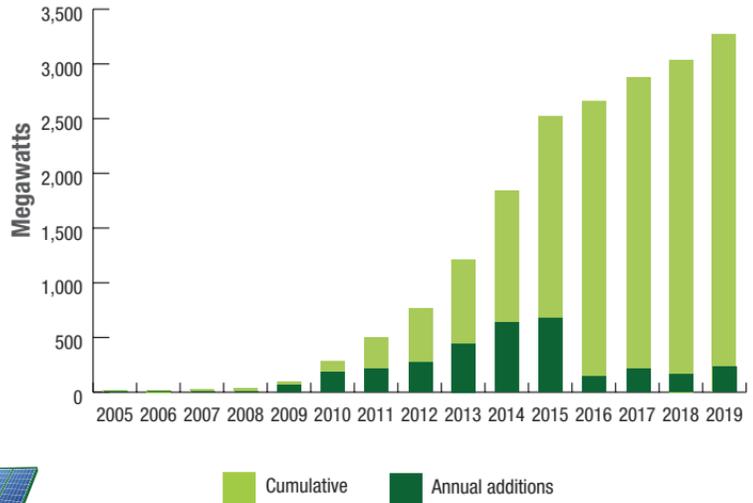
Generation (2019):

2.2 TWh

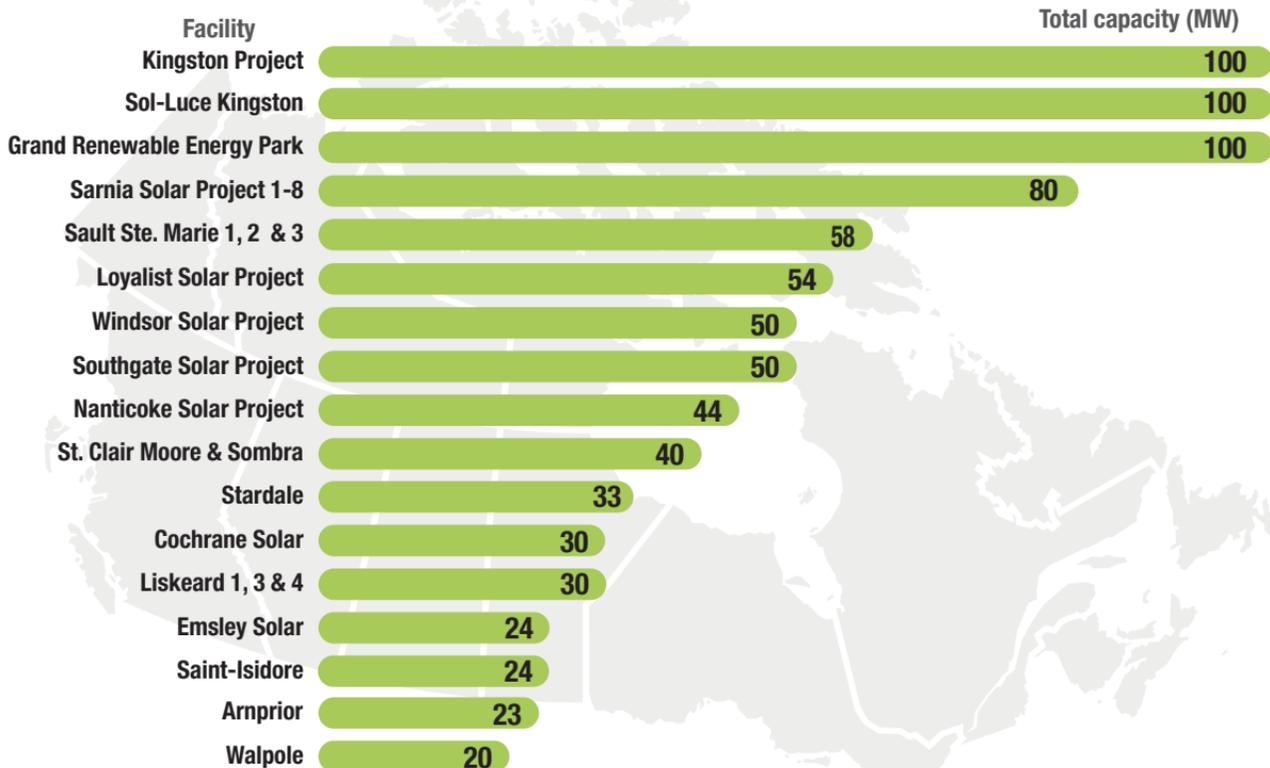
6x
more than
in 2013



INSTALLED CAPACITY



SOME OF THE LARGEST SOLAR PV FARMS IN CANADA* (≥ 20 MW)



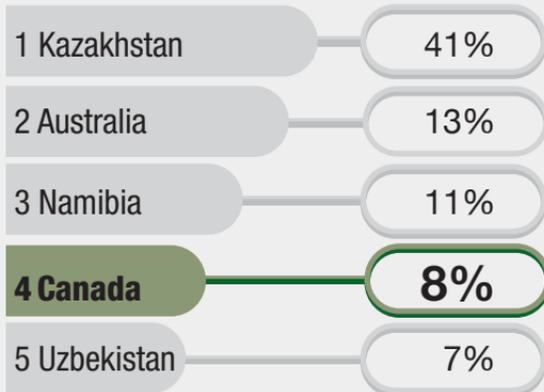
* There are 138 solar PV farms in Canada with a capacity of at least 1 MW, totaling over 2,000 MW.

URANIUM

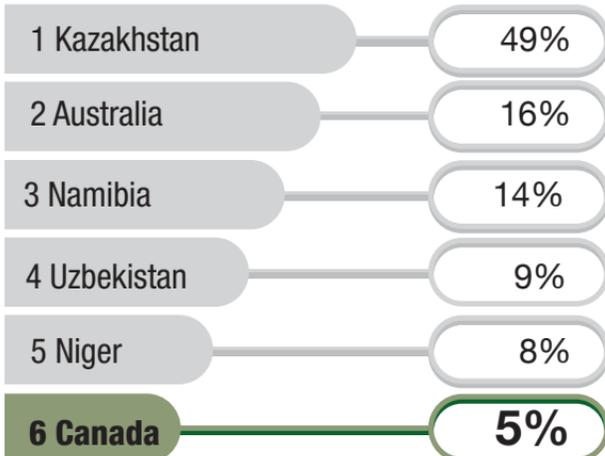
- Uranium is a silvery-white metal and a primary energy source. After raw uranium is mined and milled, it is **processed to make fuel for nuclear reactors** to generate electricity.

INTERNATIONAL CONTEXT

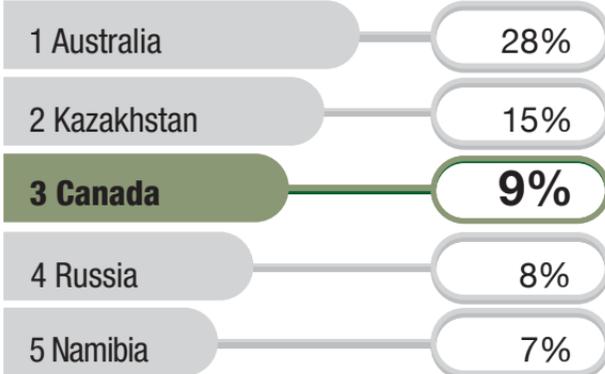
World production – 47.7 kt (2020)



World exports – 39.8 kt (2020)



World known recoverable resources – 6.1 Mt (2019)



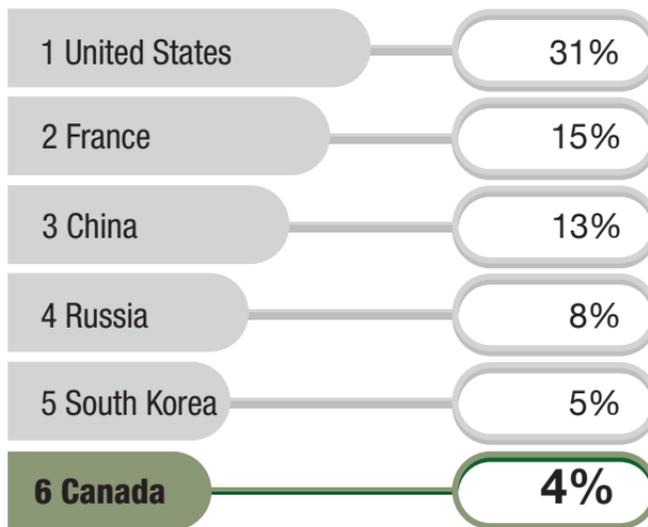
NUCLEAR POWER

- Nuclear energy is the second largest contributor of non-emitting electricity in Canada. In 2019, nuclear energy

provided approximately **15%** of **Canada's total electricity needs** (close to 60% in Ontario).

INTERNATIONAL CONTEXT

World generation – 2,586 TWh (2019)



CANADIAN SUPPLY AND DEMAND (2020) URANIUM

Canadian production **3.9 kt**

All uranium comes from mines in Saskatchewan.

VALUED AT
about

\$500 million



EXPORTS: 56% of production

Based on long-term contracts*, uranium from Canadian mines is generally sold in

- 1) North America/Latin America **42%**
- 2) Asia **35%**
- 3) Europe **23%**

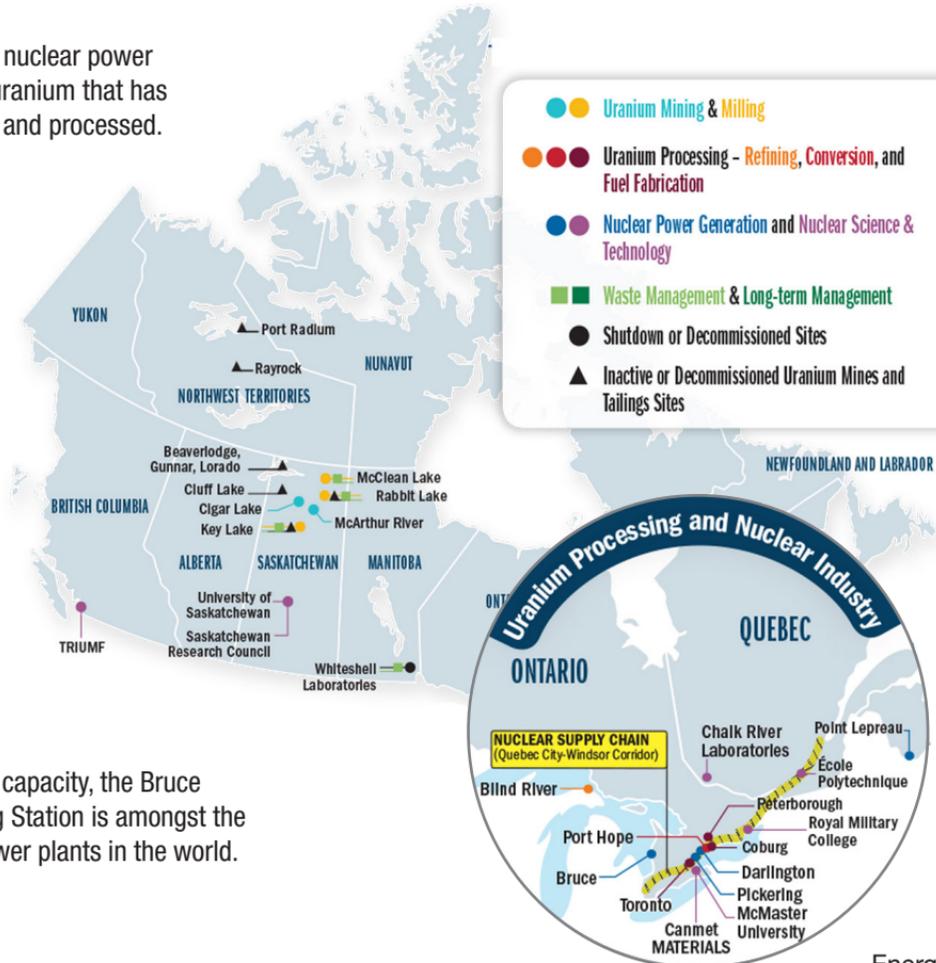
* These values can vary based on changes in regional demand.

22% of uranium purchased by U.S. nuclear reactors in 2020 came from Canada, making Canada the largest foreign supplier of uranium to the U.S.

DOMESTIC USE: 44% of production

Used in Canada's CANDU reactors (Ontario and New Brunswick), including the Bruce Generating Station, amongst the world's largest operating nuclear facilities.

Across the country, nuclear power is generated from uranium that has been mined, milled and processed.



Based on installed capacity, the Bruce Nuclear Generating Station is amongst the largest nuclear power plants in the world.

CANDU NUCLEAR REACTORS

- **Canada has developed a unique nuclear reactor technology called CANDU**, for CANada Deuterium Uranium. Canada is one of roughly half a dozen countries that offer domestically designed reactors to the open commercial market.
- The CANDU reactor is a pressurized heavy water reactor (PHWR) that uses heavy water (deuterium oxide) as a moderator and coolant and natural uranium for fuel. The majority of power reactors in use in the world are light water reactors (LWR), which use normal water as the moderator and coolant and enriched uranium for fuel.
- CANDU technology continues to evolve to enable the use of alternative fuels. Work is underway in Chinese CANDU reactors to demonstrate that they can recycle used fuel from other nuclear power plants, reducing the volume of nuclear waste.



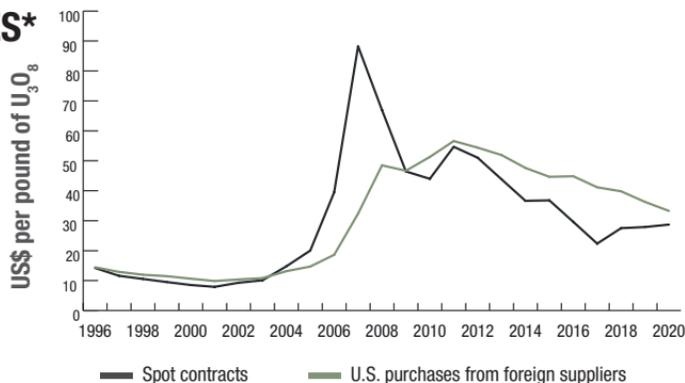
10 CANDU reactors are in operation outside of Canada.



GROSS ELECTRICAL OUTPUT OF NUCLEAR POWER PLANTS IN CANADA

Facility	Province	Gross Electrical Output (MW)	Units
Darlington	Ontario	3,736	4
Bruce A	Ontario	3,320	4
Bruce B	Ontario	3,507	4
Pickering A	Ontario	1,084	2
Pickering B	Ontario	2,160	4
Point Lepreau	New Brunswick	705	1

URANIUM - PRICES*



* The majority of Canadian uranium production is sold by long-term contract, as opposed to the on the spot market.

BIOFUELS AND TRANSPORTATION

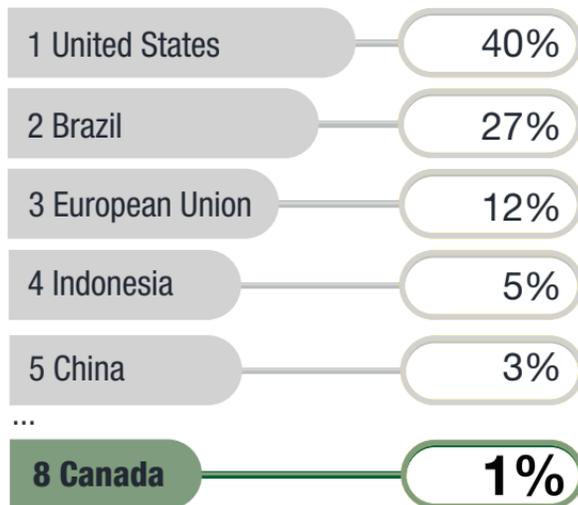
LIQUID BIOFUELS

- Liquid biofuels are enhanced biomass-derived fuels that can take the form of a liquid such as ethanol or renewable diesel fuels. The liquid biofuels are mixed with traditional gasoline and diesel to reduce the overall GHG emissions associated with the blended fuel.
- The federal *Renewable Fuels Regulations* require fuel producers and importers to have an average renewable content of **at least 5%** based on the **volume of gasoline** that they produce or import and **at least 2%** of the **volume of diesel fuel** that they produce and import.*

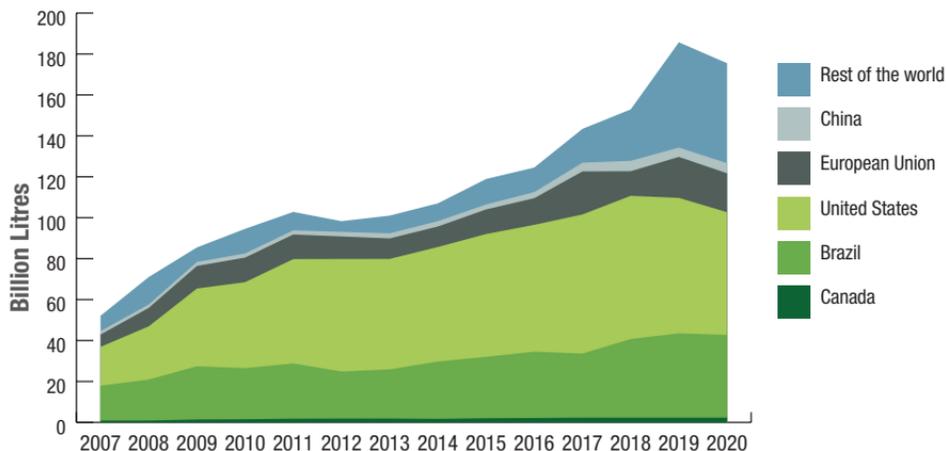
* Heating distillate oil volumes for space-heating purposes are excluded from the diesel regulations.*

INTERNATIONAL CONTEXT

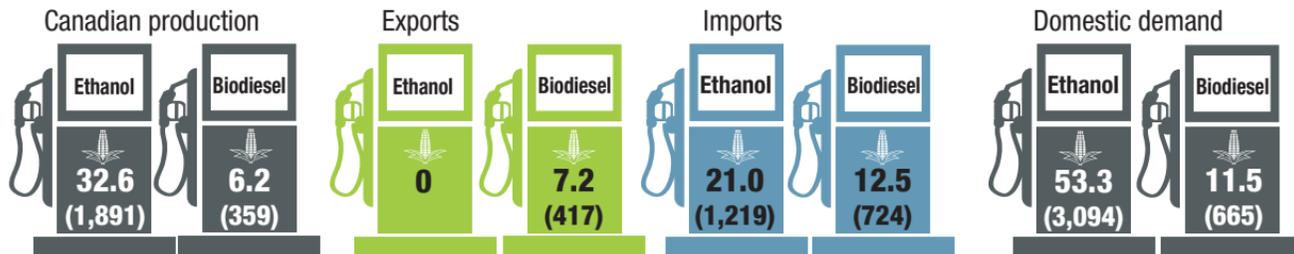
World capacity of biofuels – 151 billion litres
(2020)



WORLD BIOFUELS PRODUCTION

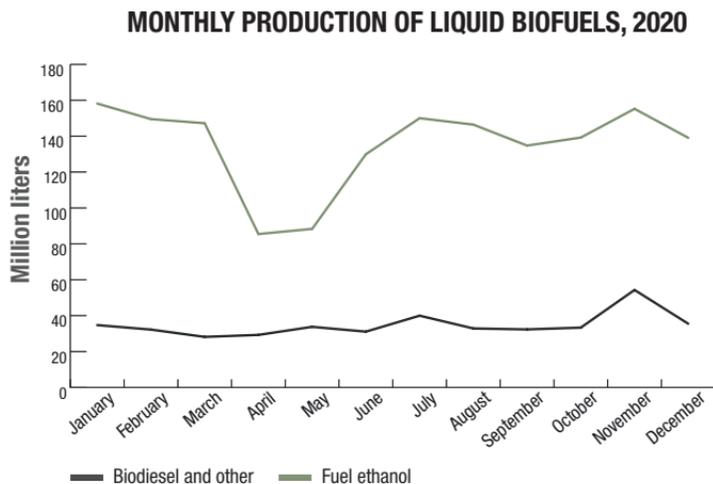


CANADIAN SUPPLY AND DEMAND (2019) (MB/D [MILLION L])



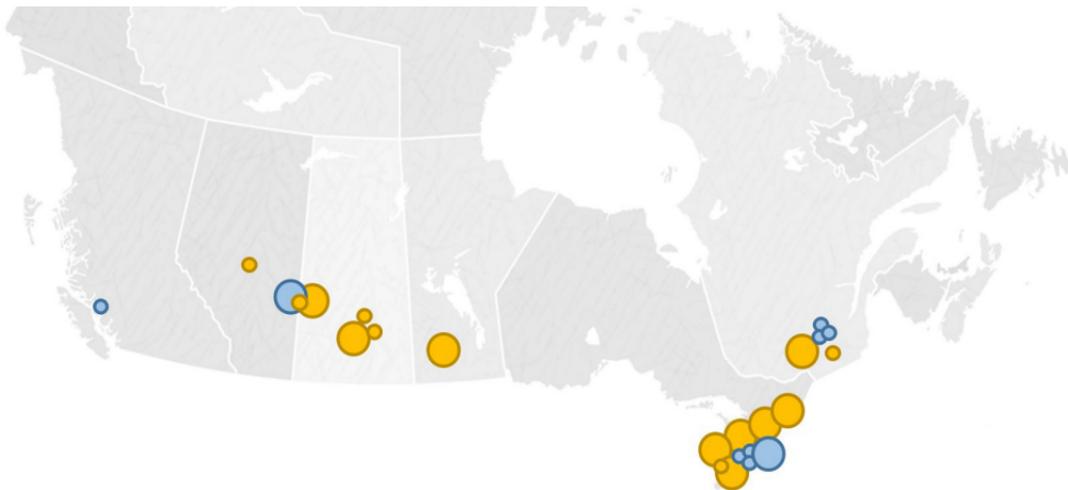
CANADIAN BIOFUEL PRODUCTION

- Liquid biofuels are made of **feedstocks such as cereal grains and vegetable oils**.
- In 2020, **4.3 million tonnes** of cereal grain, and **330 thousand tonnes** of vegetable oil were used in domestic production of biofuels.
- Canada produced **1.6 billion liters of fuel ethanol** and **418 million liters of biodiesel and other products** in 2020.
- Co-products are secondary goods that are generated during the biofuel manufacturing process and can be sold or reused. Biofuel production generated **1.8 million tonnes of co-products in 2020**, primary distillers grains which can be used as animal feed.
- Fuel ethanol production in 2020 was impacted by the effect of the pandemic on demand for transportation fuels. As well, during this time, some plants turned to producing alcohol based sanitizers.



Currently the **majority of liquid biofuels** in Canada are **produced in southern Ontario and Saskatchewan.**

CURRENT BIOFUEL PRODUCTION CAPACITY



Liquid fuels
Million litres (ML) per year

0 – 100
Small

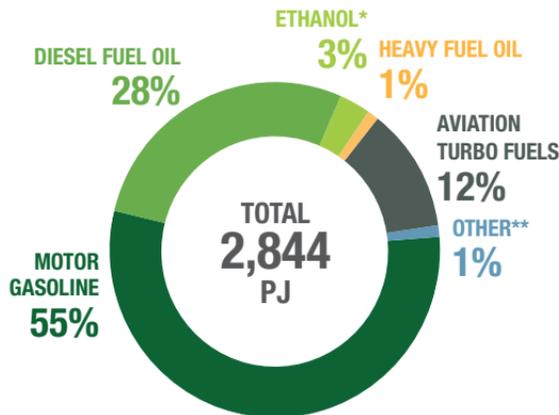
100 – 500
Medium

500 – 750
Large

750+
Giga



FUEL MIX OF THE TRANSPORTATION SECTOR, 2018

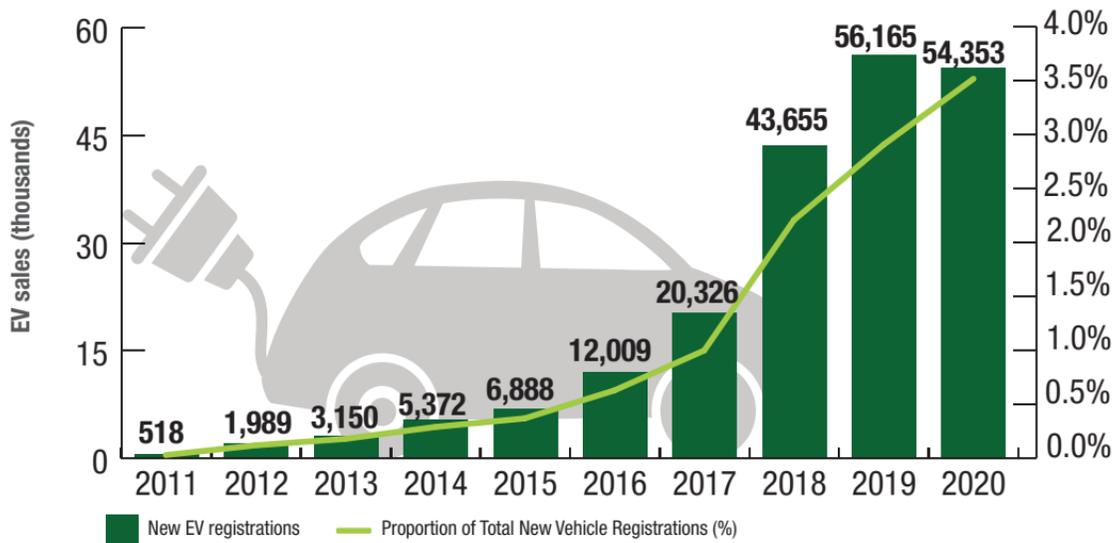


- Total transportation energy use **increased 26%** from 2000 to 2018.
- Energy efficiency improvements in the transportation sector saved Canadians **506 PJ** of energy and almost **\$16 billion** in energy costs in 2018.
- Passenger transportation contributes **53%** to the total emissions, freight emissions are **42%**, and off-road emissions are **5%**.

* The ethanol proportion is estimated based on production data.

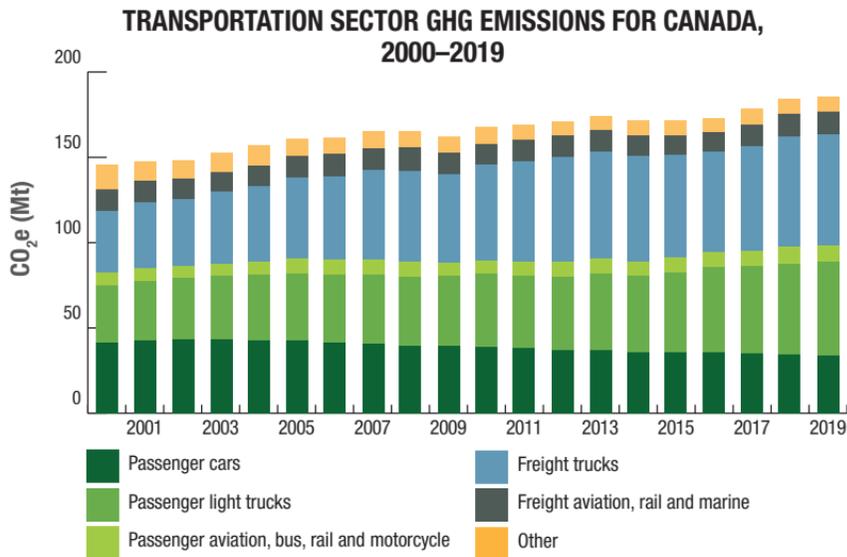
** The category "Other" includes electricity, natural gas, aviation gasoline and propane

PLUG-IN ELECTRIC VEHICLE SALES PORTION OF TOTAL VEHICLE SALES



- In 2020, electric vehicle (EV) sales made up **3.5% of total vehicle sales**.
- Over **54,000 plug-in EVs** were sold in 2020, more than double the sales in 2017. Sales are highest in the provinces of Quebec, British Columbia and Ontario.

GHG SPOTLIGHT: TRANSPORTATION



- **Transportation GHG emissions** have **increased 28%** from 2000 to 2019. Emissions from passenger light trucks and freight trucks have continued to rise because of an increased number of vehicles (especially light trucks and SUVs). Freight emissions have increased because of many factors including increasing trade and globalization and online shopping.

HYDROGEN

Hydrogen is a versatile, carbon-free energy carrier that can be produced from a variety of feedstocks.

Hydrogen can be converted to electricity through a fuel-cell in electric vehicles and power generation equipment, combusted to produce heat, or used as a feedstock in a range of chemical and industrial processes.



**Versatile
energy carrier**



**Carbon free at
point of use**



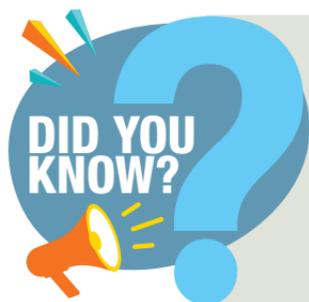
**Can be produced
from variety of
feedstocks**



**Can be
transported
long distances**



**Highest energy
per mass of
any fuel**



The energy in

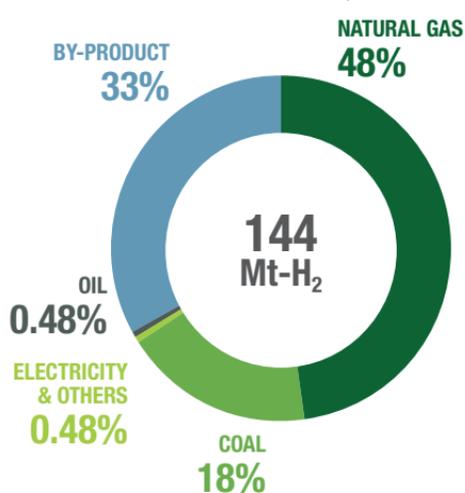
1 kg of hydrogen

is the same as approximately

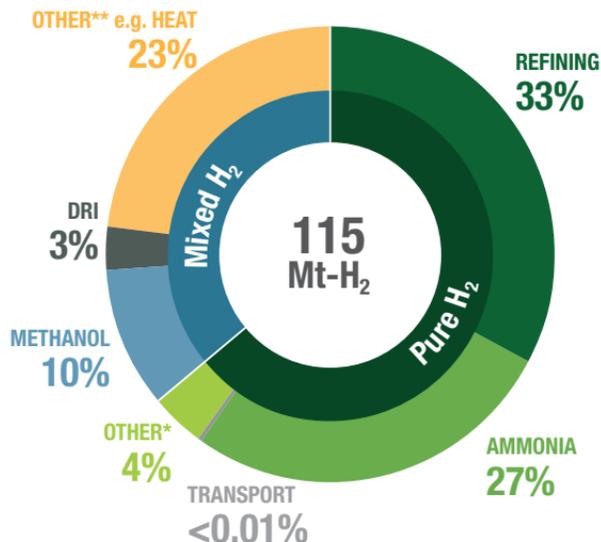
2.8 kg of gasoline.

- The total global production of hydrogen in 2018 was **144 million tonnes (Mt)**, in which **67%** of production was deliberate, and **33%** was produced as a by-product to industrial processes.
- Global demand for hydrogen in 2018 was of **115 Mt**. Applications utilizing pure hydrogen accounted for **60%** (69 Mt-H₂) of all demand. Pure hydrogen for oil refining and ammonia production were the most common end-uses, accounting for **33%** and **27%** of total demand, respectively.

**GLOBAL HYDROGEN PRODUCTION
BY ENERGY SOURCE, 2018**



**GLOBAL HYDROGEN DEMAND
BY END-USE 2018**



* Chemicals, metal, electronic, and glass making industries

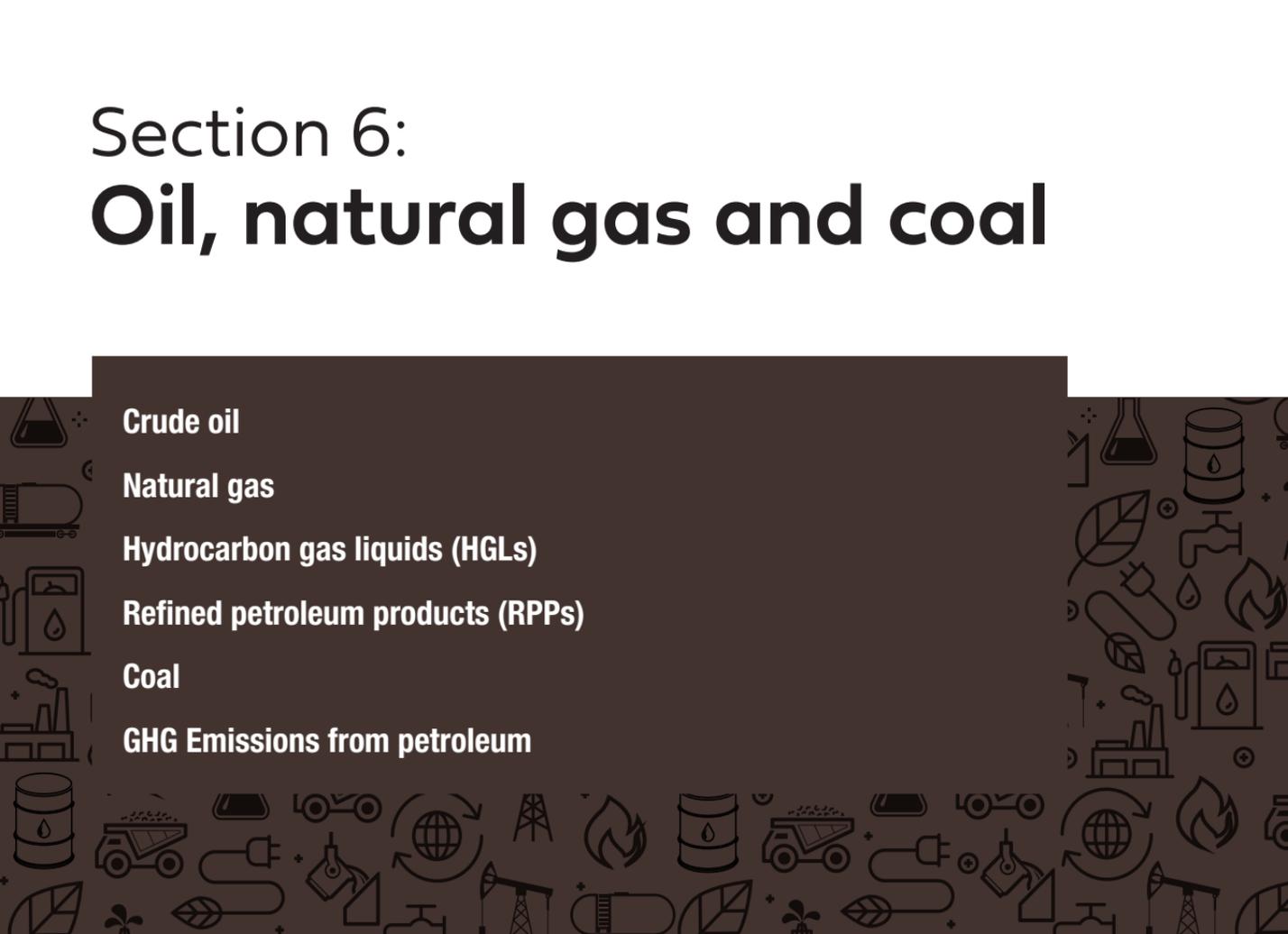
** Generation of heat from steel works arising gases and by-product gas from steam crackers

- Canada is **one of the top 10 hydrogen producers in the world today, with an estimated 3 Mt** of hydrogen produced per year.
- Most hydrogen in Canada is produced from natural gas and used by the chemical industry and the oil and gas sector. While most is currently produced without CCS technology (grey hydrogen), there are also several fossil-fuel based hydrogen with CCS (blue hydrogen) production projects and renewable-fueled (green hydrogen) hydrogen production facilities operating in Canada and under development.
- As of 2017, there were more than **100 established hydrogen and fuel cell companies** spanning the full value chain, **employing more than 2,100 people** in direct jobs within Canada, and generating **revenues in excess of \$200 million** and **investing \$91 million in RD&D**.
- **Canadian heavy-duty fuel cell engine technology** powers more than half of worldwide fuel cell electric buses in revenue service in a range of international markets.



Section 6:

Oil, natural gas and coal



Crude oil

Natural gas

Hydrocarbon gas liquids (HGLs)

Refined petroleum products (RPPs)

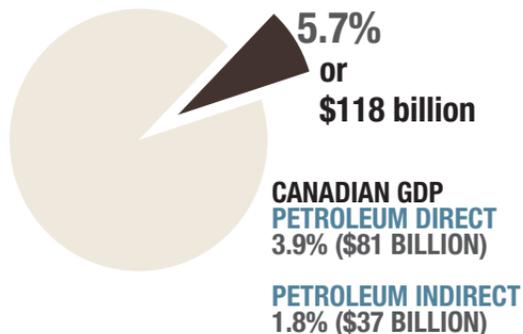
Coal

GHG Emissions from petroleum

PETROLEUM AND THE ECONOMY

NOMINAL GDP CONTRIBUTION FOR CANADA, 2020

NOMINAL GDP (% OF CURRENT DOLLARS)



- Capital Expenditures (2020): **\$38 billion**
- Canada's oil and gas sector represents about **26%** of the country's GHG emissions.
- Exports (2020): **\$86 billion** (16% of total exports)

EMPLOYMENT, 2020

DIRECT: 178,500 JOBS

OIL AND GAS EXTRACTION:	68,000
SUPPORT ACTIVITIES:	59,000
EXPLORATION:	8,000
NATURAL GAS TRANSMISSION AND DISTRIBUTION:	19,000
CRUDE OIL PIPELINES:	5,600
OTHER:	19,000

INDIRECT: 415,000 JOBS

TOTAL: 593,500 JOBS

Approximately
**10,400 Indigenous
people** are employed in
the oil and gas sector.



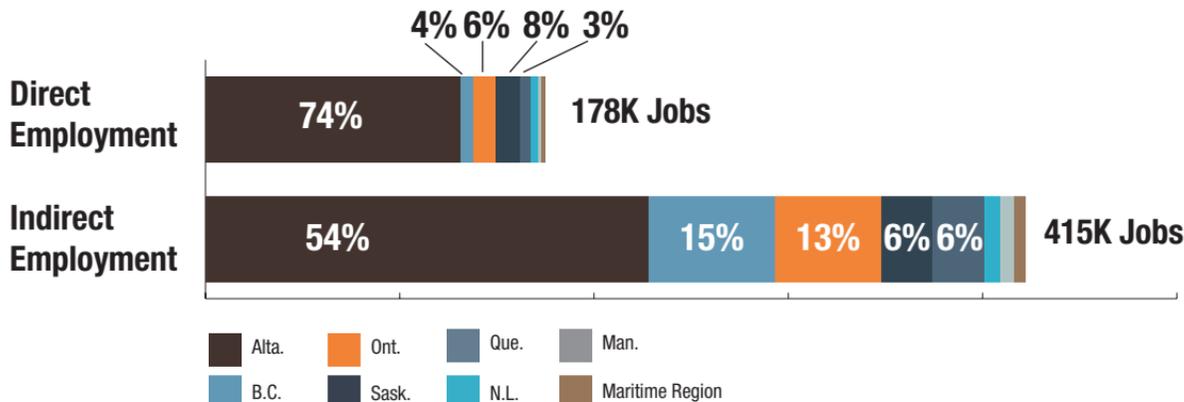
4TH Largest oil producer globally

5TH Largest gas producer globally

While Canada's petroleum sector **directly employed 178K people** in 2020, the sector's use of inputs from other industries created an additional

415K indirect jobs in the supply chain.

Alberta employed the majority (54%) of the supply chain workers followed by BC (15%). Ontario (13%) and Quebec (6%) also accounted for sizeable shares of supply chain jobs.



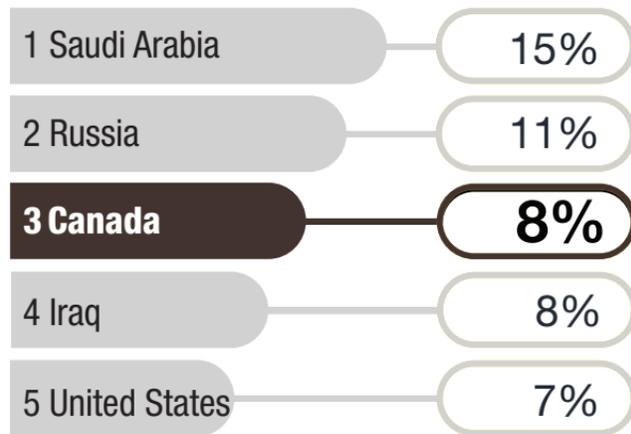
CRUDE OIL

INTERNATIONAL CONTEXT

World production* – 82.8 MMb/d (2020)



World exports* – 47.7 MMb/d (2019)

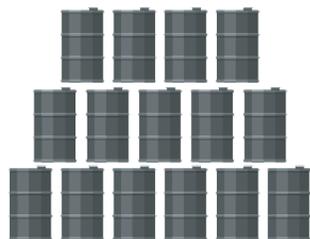


* includes crude oil, NGLs, additives and other hydrocarbons (including the receipts of additives).

World proved reserves

1,728 billion barrels

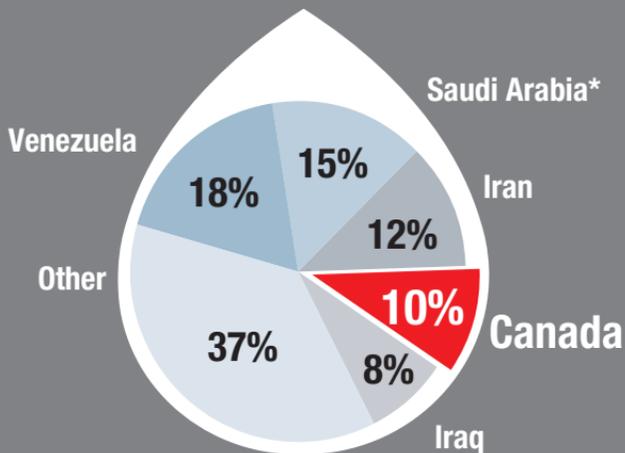
(at the end of 2020)



Proved reserves are those reserves expected to be recoverable with a high degree of certainty.



of Canada's proven oil reserves are located in the oil sands.

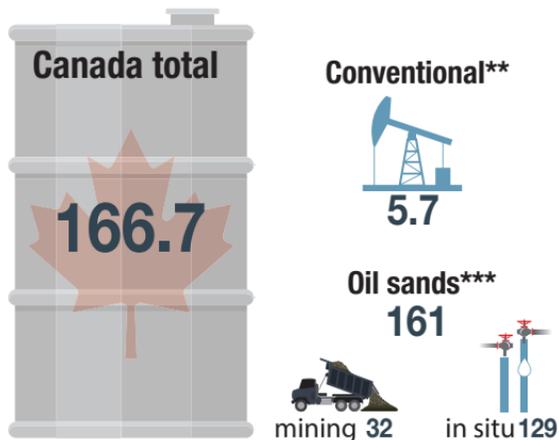


*Saudi Arabia and Kuwait reserves include the Saudi-Kuwaiti "neutral zone," with total proved reserves of 5 billion barrels.

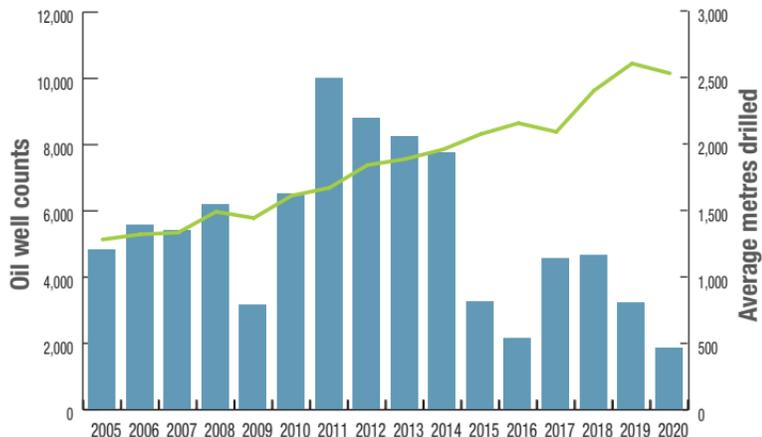
CANADIAN RESOURCES

REMAINING ESTABLISHED RESERVES*

(billion barrels, as of December 2020)



OIL WELLS COMPLETED AND AVERAGE METRES DRILLED IN WESTERN CANADA



■ Wells completed — Average metres drilled

* Reserves known to exist and recoverable under current technological and economic conditions.

** Reserves also include proved reserves of pentanes plus (a crude-oil equivalent that is associated with oil production).

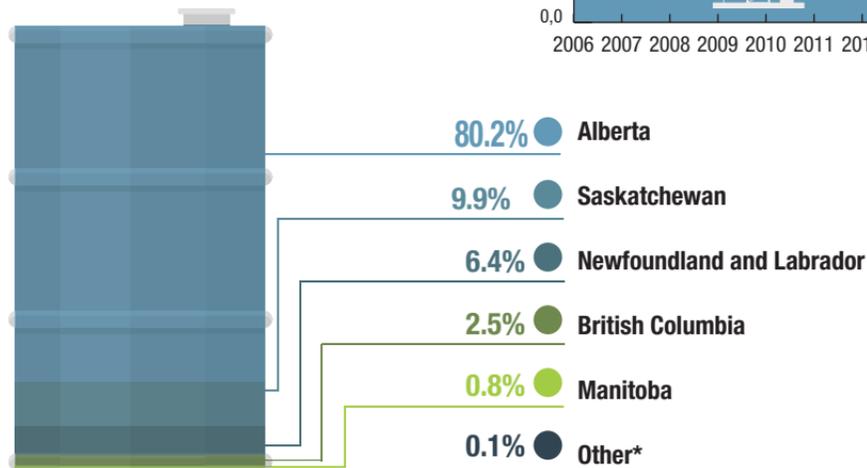
***With improved technology, it is estimated that 315 billion barrels are ultimately recoverable from the oil sands.

CANADIAN PRODUCTION

Oil sands production has exceeded conventional production since 2010.

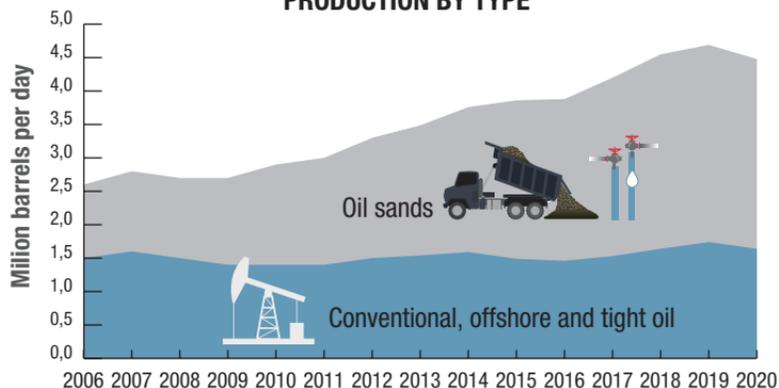
In 2020, oil sands production was **2.8 MMb/d** compared with **1.6 MMb/d** of other oil production.

PRODUCTION BY PROVINCE, 2020



*Other: Nova Scotia, Ontario and the Northwest Territories include crude oil, condensates and pentanes plus.

PRODUCTION BY TYPE



CANADIAN SUPPLY AND DEMAND* (2020)

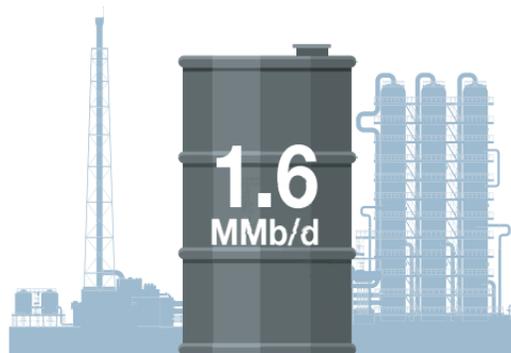
Canadian production



Exports



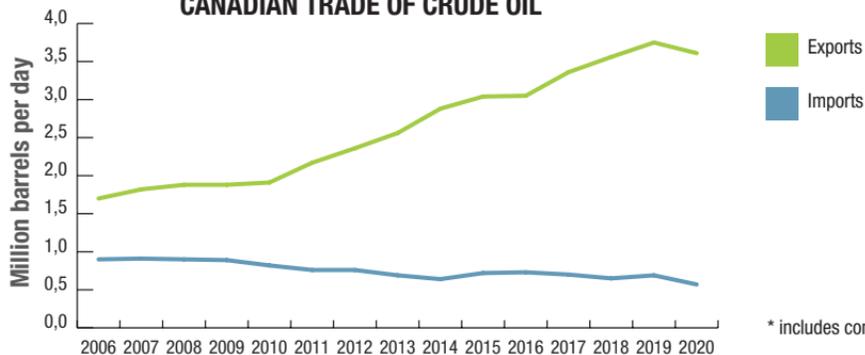
Imports



CRUDE OIL INPUT TO DOMESTIC REFINERIES

TRADE

CANADIAN TRADE OF CRUDE OIL



* includes condensates and pentanes plus.

OIL SANDS

An estimated **\$332 billion** of capital investment to date, including

\$7.4 billion in 2020



OF CANADA'S PROVED RESERVES



**OF CANADA'S OIL PRODUCTION IN
2020 OR 2.8 MMb/d**

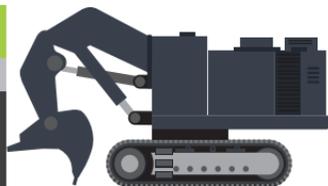
BITUMEN UPGRADING

- Crude bitumen from oil sands may be transported to upgraders for processing to make it lighter – “synthetic crude oil.”
- In 2020, **47%** of the raw bitumen produced was sent for upgrading in Alberta.
- Major companies with upgrading capacity include Syncrude, Suncor, Shell, Canadian Natural Resources, Husky and Nexen-CNOOC.
- The total upgrading capacity in Canada is **1.33 MMb/d**
- Bitumen may also be blended with diluent (e.g. condensates) and sold directly to refineries capable of processing heavier oils.

MINING METHOD

Process: Companies use trucks and shovels to scoop oil sands from the ground. The oil sands are then transported to extraction plants where bitumen is separated from the sand by using steam. Tailings are then pumped into settling basins.

In 2020, **seven projects in Alberta** produced **1,611 Mb/d**: Syncrude Mining Project (**354 Mb/d**), Suncor Base Mine (**290 Mb/d**), CNRL Horizon Mine (**234 Mb/d**), Athabasca Oil Sands Project – Muskeg River (**159 Mb/d**), Jackpine Mine (**130 Mb/d**), Imperial's Kearl Mine (**280 Mb/d**) and Fort Hills (**164 Mb/d**).



↑
formation of
75 m or less
↓

50%

OF CURRENT
PRODUCTION

20%

OF OIL SANDS
RESOURCES

IN SITU METHOD

Process: Companies drill vertical and/or horizontal wells to inject steam to facilitate the flow of oil.

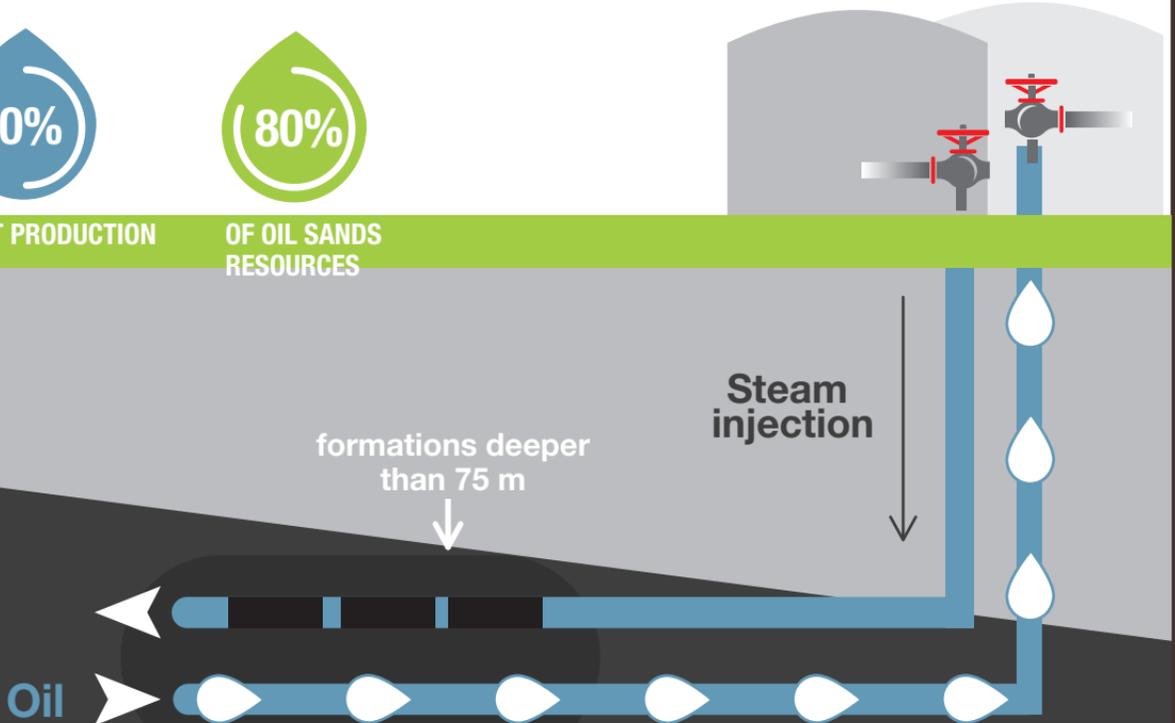
More than 20 projects in Alberta – The largest projects in 2020 were Firebag and MacKay River (Suncor) at 217 Mb/d, Christina Lake (Cenovus) at 159 Mb/d, Foster Creek (Cenovus) at 159 Mb/d and Cold Lake (Imperial Oil) at 142 Mb/d.



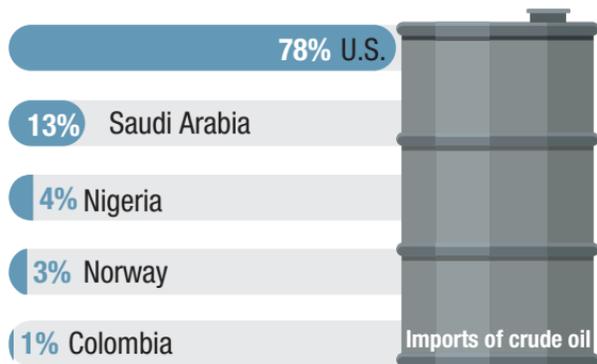
OF CURRENT PRODUCTION



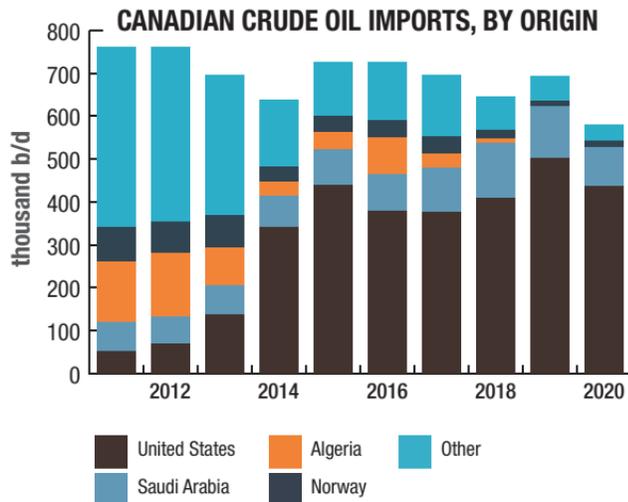
OF OIL SANDS
RESOURCES



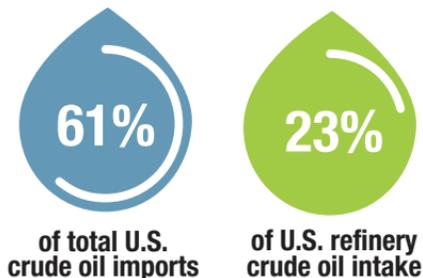
In 2020, imports of crude oil into Canada came from a range of countries including:



Over recent years, the U.S. has become Canada's primary supplier of imported crude oil.



In 2020, Canada was the **largest foreign supplier of crude oil** to the U.S., accounting for



exported



representing
97%
of all Canadian crude oil exports

PRICES

WEST TEXAS INTERMEDIATE (WTI)

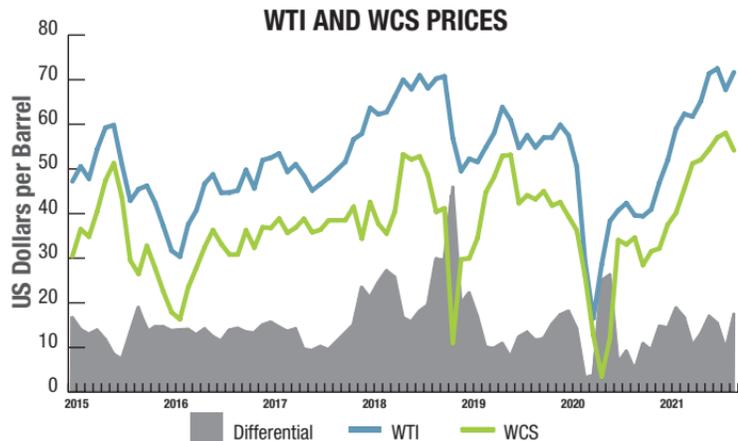
- Reference price for light crude oil delivered at Cushing, Oklahoma (a major pipeline hub)
- Used as the benchmark price for North American crudes and underlies oil futures contracts on the NYMEX

WESTERN CANADIAN SELECT (WCS)

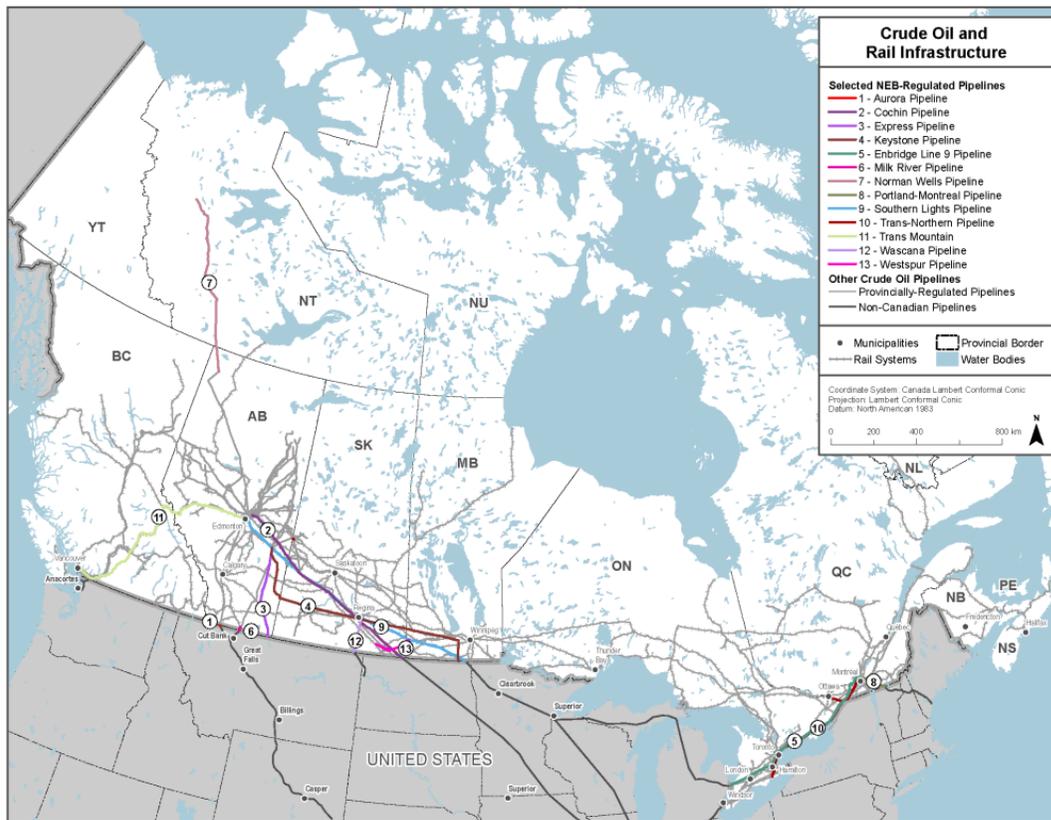
- WCS is the main benchmark price for Canadian heavy crude, specifies delivery at Hardisty, Alberta and is representative of the price of oil from the oil sands.

WTI-WCS DIFFERENTIAL

- WCS is typically sold at a discount to WTI due to differences in quality and transportation costs. Heavy crude is more difficult to process and requires specialized equipment at refineries.
- The WCS-WTI differential has historically averaged between US\$10-\$15 per barrel. However, during the fall of 2018, the differential reached a record high of over US\$50 per barrel due to insufficient pipeline capacity.
- In Q2 2020, oil prices collapsed due to the drop in demand resulting from government-imposed lockdowns to limit the spread of Covid-19. US refineries drastically reduced their refinery runs and purchases of Canadian heavy crude.
- Beginning in Q3 2020, demand recovered as lockdown measures were eased. This resulted in a big price rebound for major crude benchmarks in the later half of 2020 and into 2021.



TRANSPORTATION BY PIPELINE AND RAIL

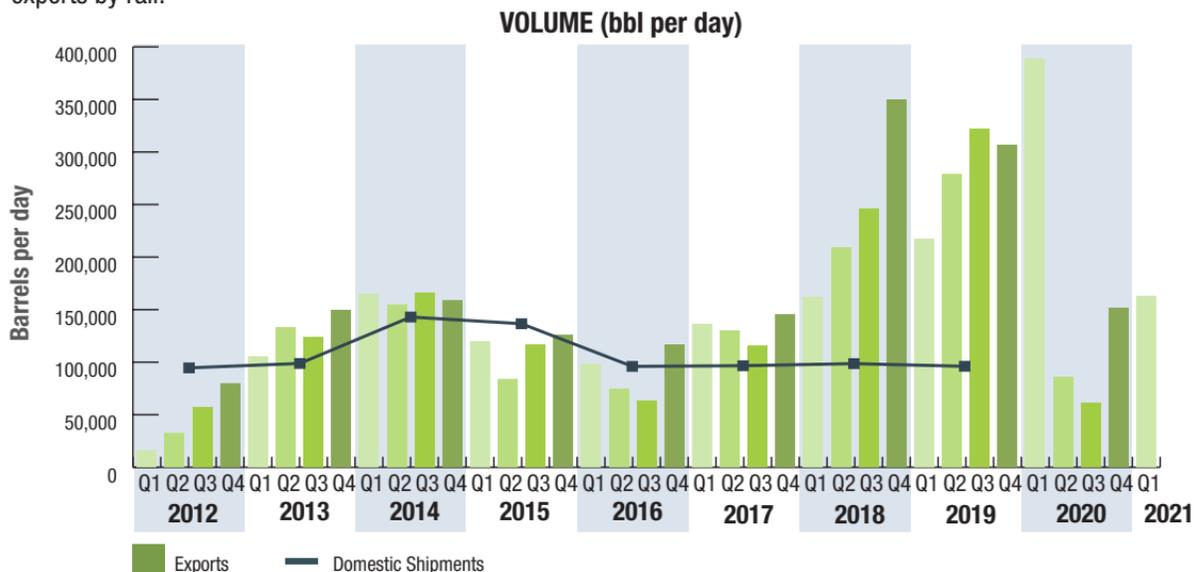


BY RAIL

In 2018, as production increases in Western Canada began to outpace pipeline capacity, shipments of crude oil by rail increased to fill the gap, more than doubling from their 2017 levels.

Amidst the economic disruption beginning in Q1 2020, crude shipments surged beyond their 2019 peak, reaching a high of **412 Mb/d** in February 2020. This upswing was promptly reversed in Q2, when shipments fell sharply. After bottoming-out at a four year low in July 2020, volumes have started to recover.

Domestic rail shipments of fuel oils and crude petroleum are relatively stable as compared to volumes of crude oil exports by rail.

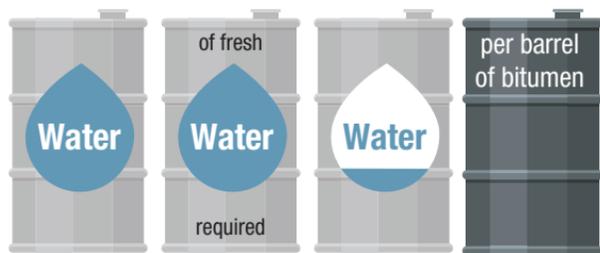


OIL SANDS: ENVIRONMENTAL CONSIDERATIONS

WATER

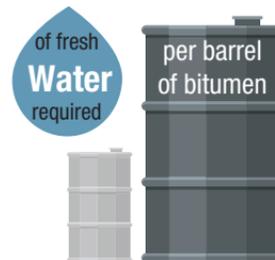
Mining method:

2.2 barrels



In situ method: an average of

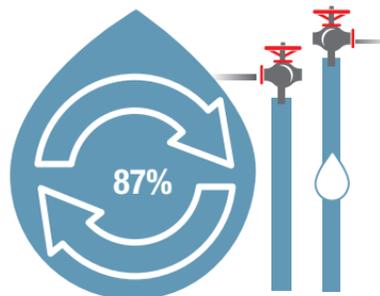
0.2 barrels



Oil sands producers recycle about



OF THE WATER USED FOR ESTABLISHED MINES



OF THE WATER USED FOR IN SITU PRODUCTION

GREENHOUSE GASES

11% of Canada's total GHG emissions and **0.15%** of global emissions

From 2000 to 2019, the **emission intensity** of oil sands operations **dropped** by about



33%



as a result of **technological and efficiency improvements**, fewer venting emissions and reductions in the percentage of crude bitumen being upgraded to synthetic crude oil.



LAND

- area of oil sand resources **142,200 km²**
- total mineable area **4,800 km²**
- total area being mined **953 km²**
tailings ponds **257 km²**

For comparison:

- Canada's area **10,000,000 km²**
- Canada's boreal forest **2,700,000 km²**

NATURAL GAS

INTERNATIONAL CONTEXT

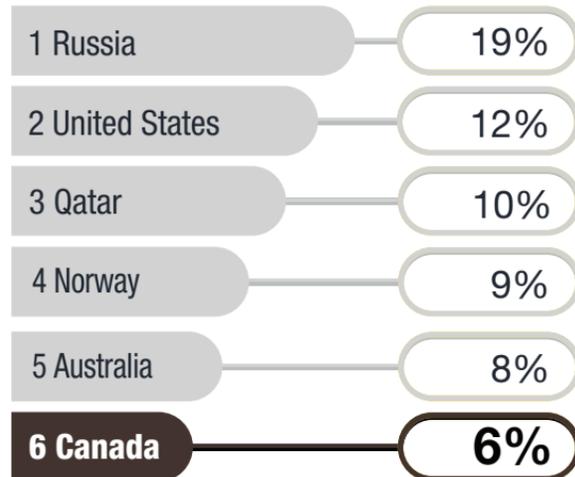
World production – 388 Bcf/d (11 Bcm/d)

(2020, PRELIMINARY)

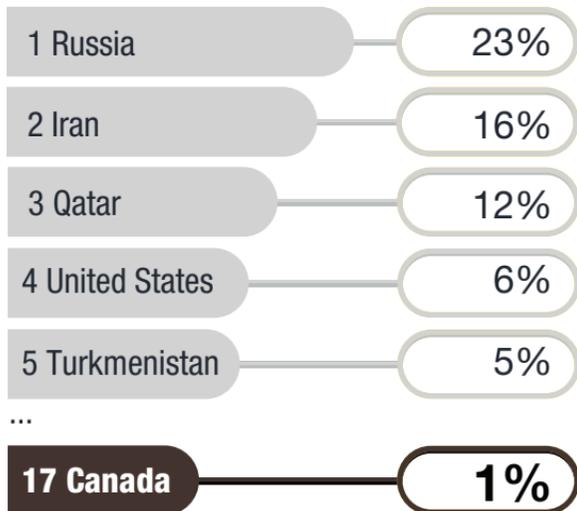


World exports – 120 Bcf/d (3.4 Bcm/d)

(2020, PRELIMINARY)



World proved reserves – 7,257 Tcf (205 Tcm) (BEGINNING OF 2019)

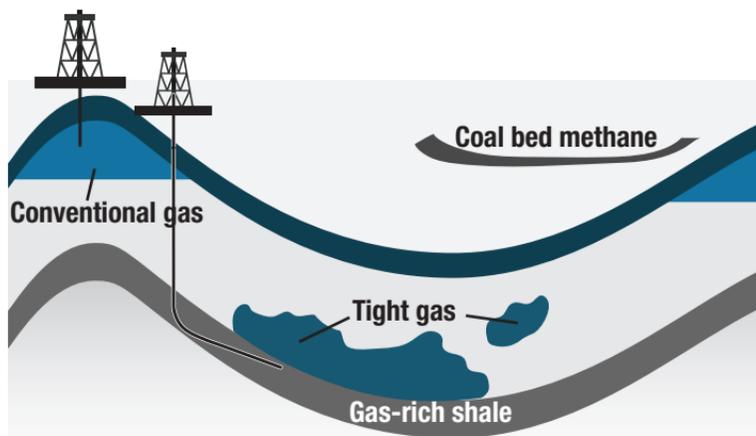
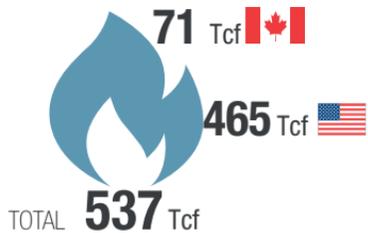


World unproved technically recoverable shale resources – 7,577 Tcf (2015)



CANADA-U.S. RESOURCES

PROVED RESERVES* (End 2019/Beginning 2020)



MARKETABLE/TECHNICALLY RECOVERABLE RESOURCES**

Canada total,
year-end 2019 **1,378 Tcf**

conventional
384 Tcf

unconventional
994 Tcf

(coal-bed methane, shale and tight gas)

World total **28,570 Tcf**

conventional **15,044 Tcf**

unconventional **13,526 Tcf**

U.S. total,
year-end 2018 **2,867 Tcf**

portion that is
shale and tight gas **1,999 Tcf**

portion that is
other **868 Tcf**

* Proved reserves are known to exist and are recoverable under current technological and economic conditions.

** Canadian marketable resources: natural gas that is in a marketable condition, after the removal of impurities and after accounting for any volumes used to fuel surface facilities. Marketable resources are recoverable using existing technologies, based on geological information, but much of the drilling necessary to produce the natural gas has not yet been performed. U.S. technically recoverable resources: gas estimated to be recoverable as drilling and infrastructure expands (similar to Canadian marketable resources)

CANADA-U.S. MARKET (2020)

Canada's natural gas market is heavily integrated with that of the U.S. largely because of the location of supply basins, demand centres, and the availability of transportation infrastructure, as well as existing Canada-U.S. trade agreements. These factors allow for consumers and distributors on either side of the border to freely access natural gas from the lowest cost supplier.

Canadian average marketable production

16.1 Bcf/d (0.46 Bcm/d)



16% conventional

84% unconventional*

U.S. average marketable production

91.4 Bcf/d (2.59 Bcm/d)



11% conventional

89% unconventional*

* Unconventional gas includes tight gas, coal bed methane and shale gas.



Canada-U.S. production

107.5 Bcf/d (3.04 Bcm/d)

LNG imports of North American countries



0.08 Bcf/d 

0.25 Bcf/d 

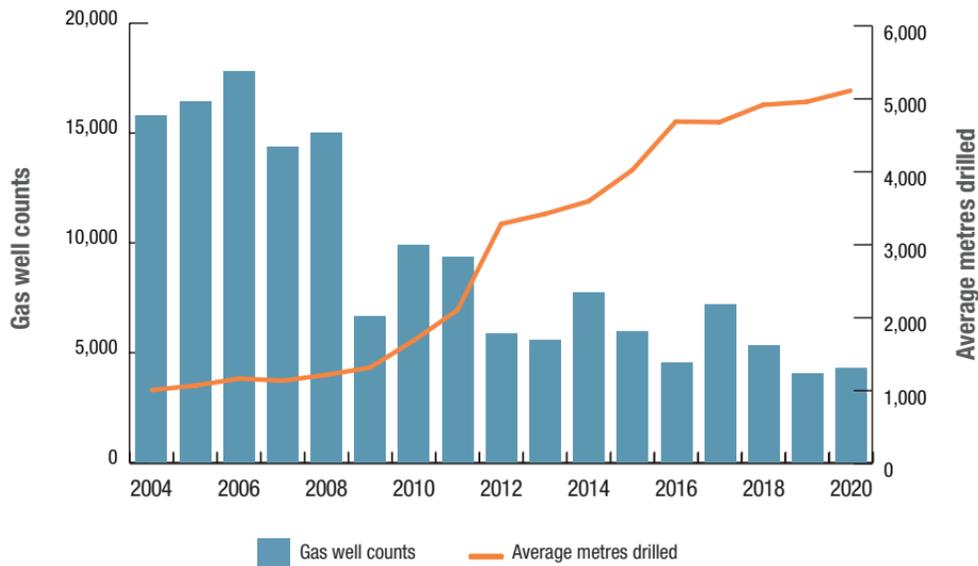
0.13 Bcf/d 

LNG exports of North American countries



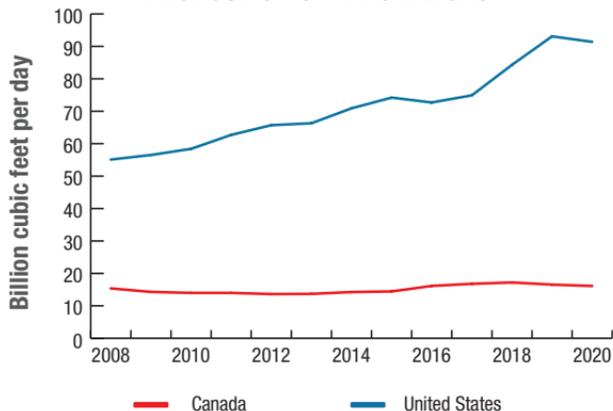
6.53 Bcf/d 

NATURAL GAS WELLS COMPLETED AND AVERAGE METRES DRILLED IN WESTERN CANADA

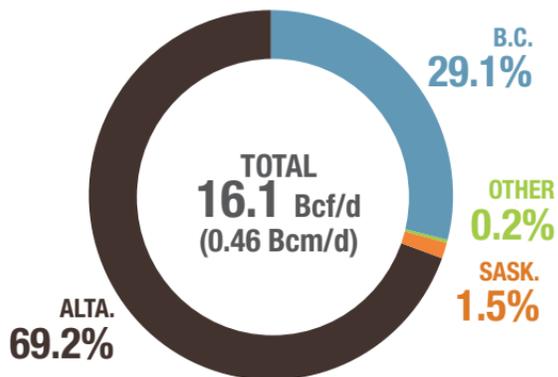


While Canadian natural gas production remained relatively flat and the number of wells drilled declined, the well productivity has increased over time. This reflects the increased use of horizontal drilling and increased well length.

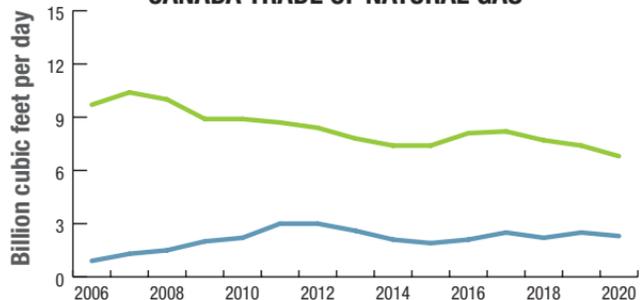
CANADIAN AND U.S. MARKETABLE PRODUCTION OF NATURAL GAS



MARKETABLE PRODUCTION BY PROVINCE, 2020



CANADA TRADE OF NATURAL GAS



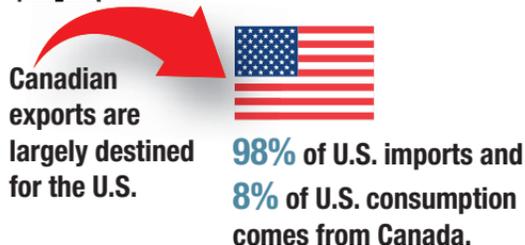
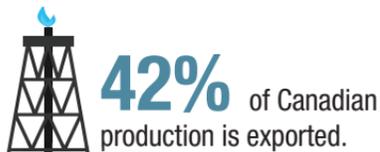
Canadian exports to the U.S.



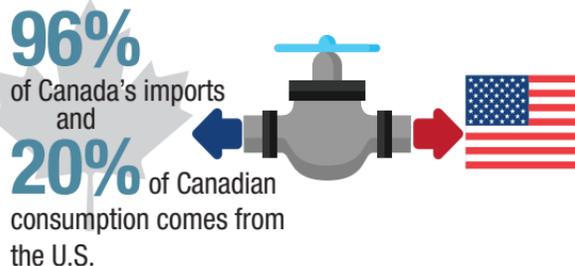
Canadian imports from the U.S.



- Natural gas imports from the U.S. into Eastern Canada are on the rise because of higher supplies in the U.S. Northeast and shorter transportation distances from these U.S. natural gas basins.
- Canadian natural gas exports to the western U.S. and U.S. Midwest remain significant.
- Since 2009, Canada has also imported small amounts of liquefied natural gas from other countries through the Canaport LNG terminal in Saint John, N.B.



The value of Canadian net exports (exports minus imports) was **\$4.7 billion** in 2020.



UPSTREAM PRICES

The AECO hub is Canada's largest natural gas trading hub, and the AECO price serves as a benchmark for Alberta wholesale natural gas transactions.

AECO PRICE

Average: 2008–2019 **\$3.39/MMbtu**

Average: 2016 **\$2.18/MMbtu**

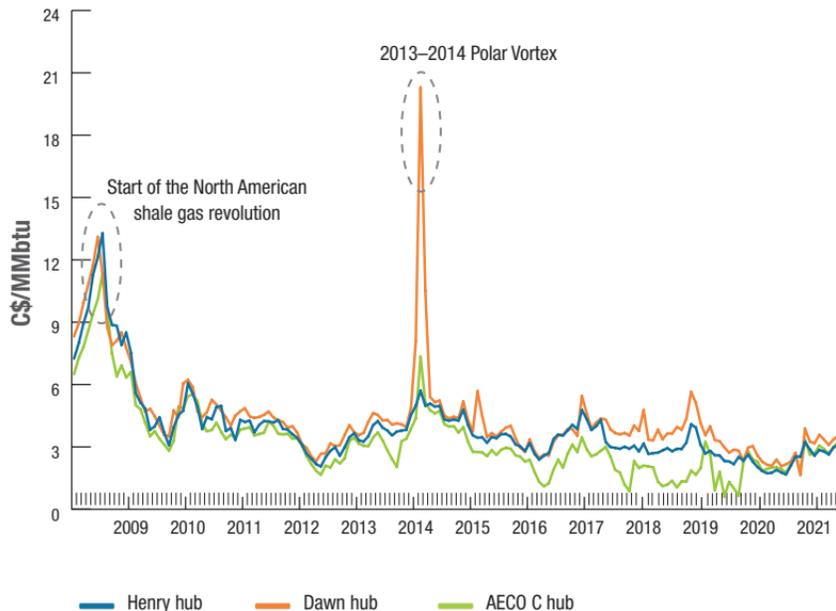
Average: 2017 **\$2.20/MMbtu**

Average: 2018 **\$1.54/MMbtu**

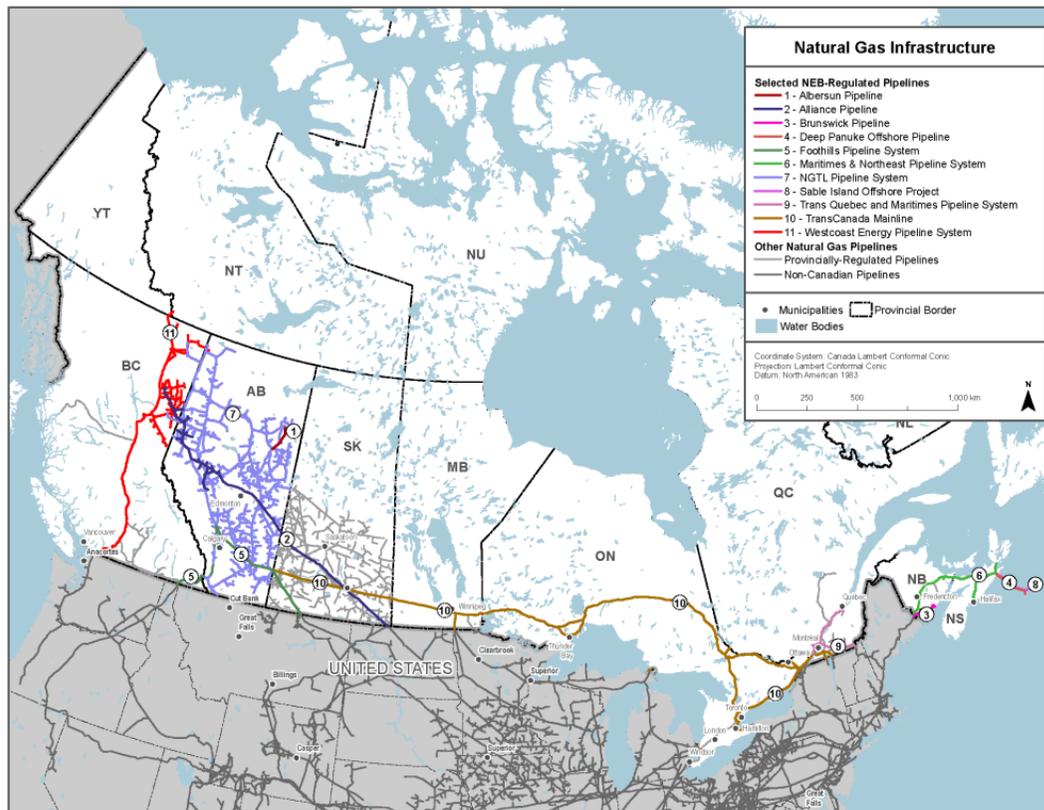
Average: 2019 **\$1.80/MMbtu**

Average: 2020 **\$2.19/MMbtu**

MONTHLY AVERAGE NATURAL GAS SPOT PRICES



TRANSPORTATION BY PIPELINE

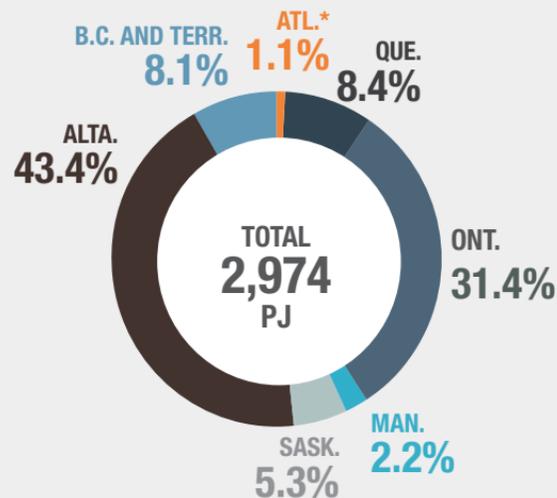


NATURAL GAS ENERGY USE

NATURAL GAS END USE BY SECTOR, 2018

Sector	Energy use (PJ)	Energy use (Bcf/d)	% of the total
Residential	750.1	1.86	25.2%
Commercial	575.5	1.43	19.4%
Industrial	1,600.7	3.97	53.8%
Transportation	4.5	0.01	0.2%
Agriculture	43.1	0.11	1.4%
Total	2,973.9	7.37	100%

NATURAL GAS ENERGY USE BY PROVINCE, 2018



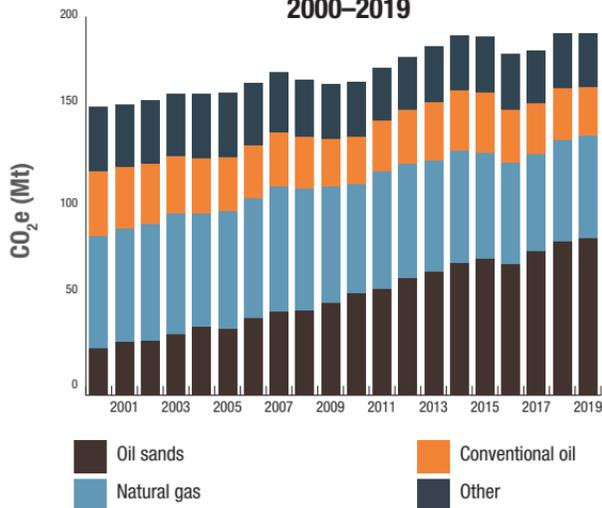
* Atlantic provinces

SPOTLIGHT: OIL AND GAS

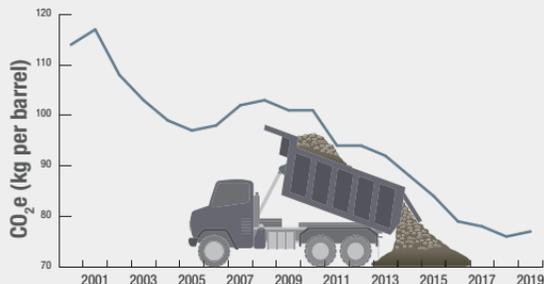
GHG emissions from oil and gas production **have gone up 25% between 2000 and 2019**, largely from increased oil sands production, particularly in situ extraction.

During this period, oil sands production emissions **more than tripled** while conventional oil and natural gas emissions **decreased by 14%**.

OIL AND GAS SECTOR GHG EMISSIONS FOR CANADA, 2000–2019



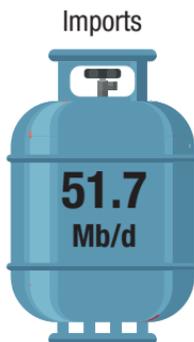
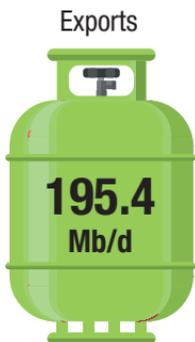
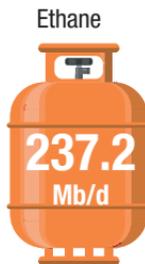
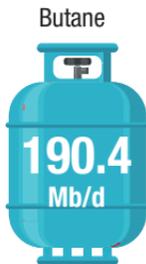
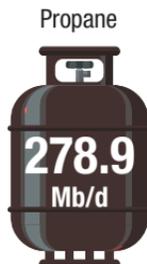
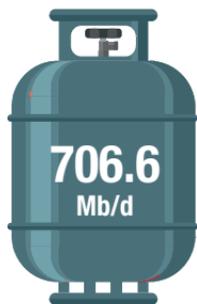
OIL SANDS EMISSIONS INTENSITY



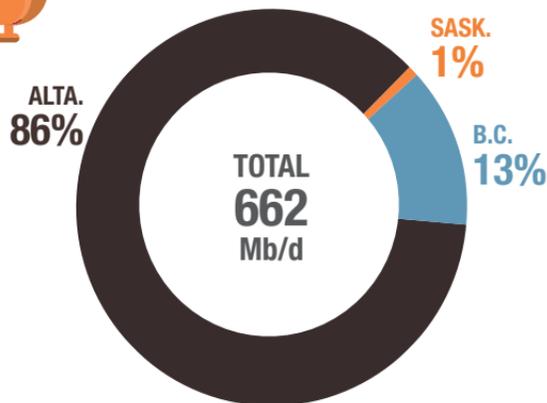
- Due to technological and operational efficiency improvements, oil sands emissions per barrel have **decreased 33%** from 2000 to 2019.

HYDROCARBON GAS LIQUIDS (HGLs) SUPPLY AND DEMAND* (2020)

Canadian production



GAS PROCESSING PLANT PRODUCTION
OF NGLS BY PROVINCE



* excludes condensates and pentanes plus, which are included as part of crude oil, and includes refinery-produced LPGs.

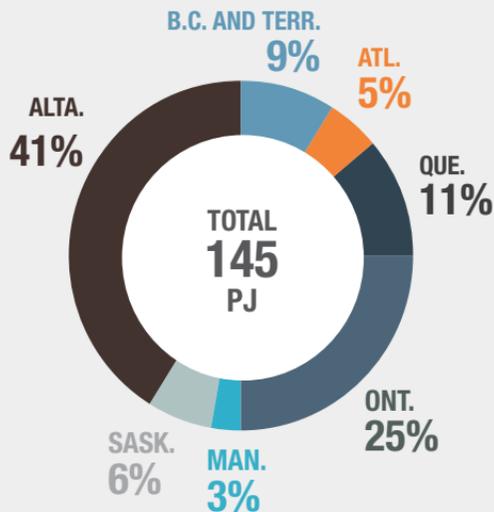
NATURAL GAS LIQUIDS ENERGY USE

TOTAL NATURAL GAS LIQUIDS ENERGY USE
WAS 144.9 PJ IN 2018.

Sector	Energy use* (PJ)	% of the total
Residential	14.7	10.2%
Commercial	35.5	24.5%
Industrial	73.1	50.4%
Transportation	11.7	8.1%
Agriculture	9.9	6.8%
Total	144.9	100%

*secondary energy use

NATURAL GAS LIQUIDS ENERGY USE
BY PROVINCE, 2018



REFINED PETROLEUM PRODUCTS (RPPs)

PETROLEUM REFINERIES

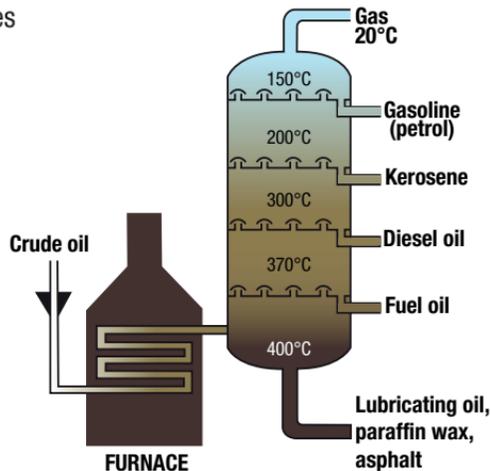
Petroleum refineries transform crude oil into a wide range of refined petroleum products (RPPs, e.g. gasoline, diesel). Other facilities such as asphalt plants, lubricant plants, upgraders and some petrochemical plants also process crude oil to produce a limited range of products.

REFINERY ACTIVITIES

- **crude oil distillation:** separating products from crude oil by heating
- **additional processing:** e.g. catalytic cracking, reforming, coking
- **product blending:** end-use RPPs are usually blended with additives or renewable fuels

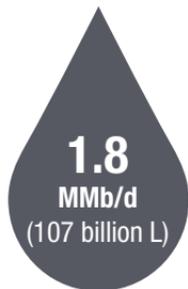
REFINERY OUTPUTS

- transportation fuels: gasoline, diesel, aviation fuels, heavy fuel oil
- heating oil
- liquid petroleum gases: propane and butane from refineries
- petrochemical feedstock
- other products: e.g. kerosene, lubricating oils, greases, waxes, asphalt

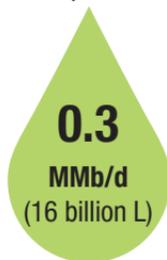


SUPPLY AND DEMAND* (2020)

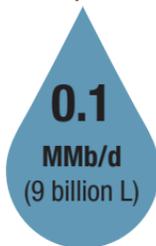
Canadian net production



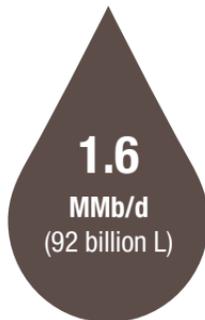
Exports



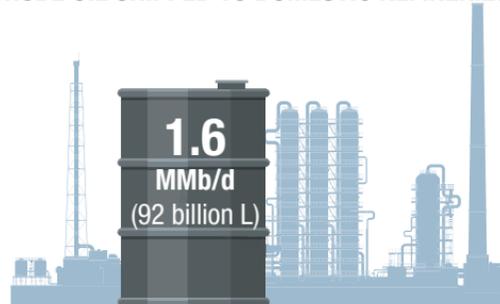
Imports



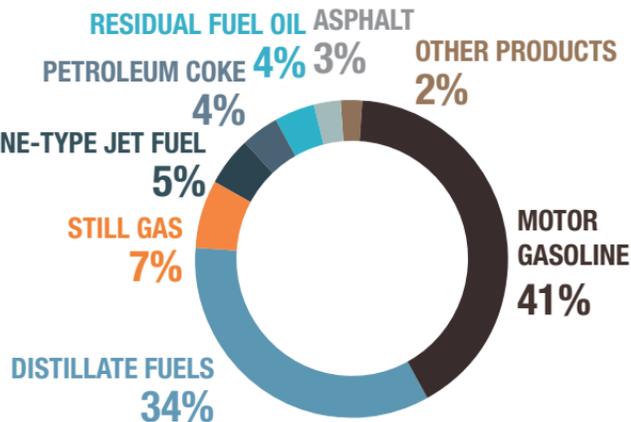
Domestic Consumption



CRUDE OIL SHIPPED TO DOMESTIC REFINERIES



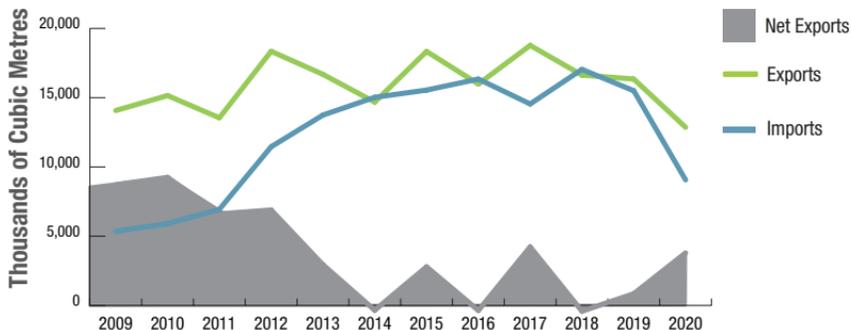
DOMESTIC CONSUMPTION BY PRODUCT*



* Certain product shares are based on Natural Resources Canada estimates.

TRADE

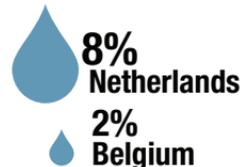
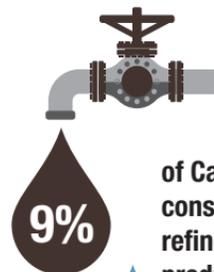
CANADIAN TRADE OF MAJOR REFINED PETROLEUM PRODUCTS



Primarily motor gasoline, diesel, jet fuel, fuel oil, and kerosene

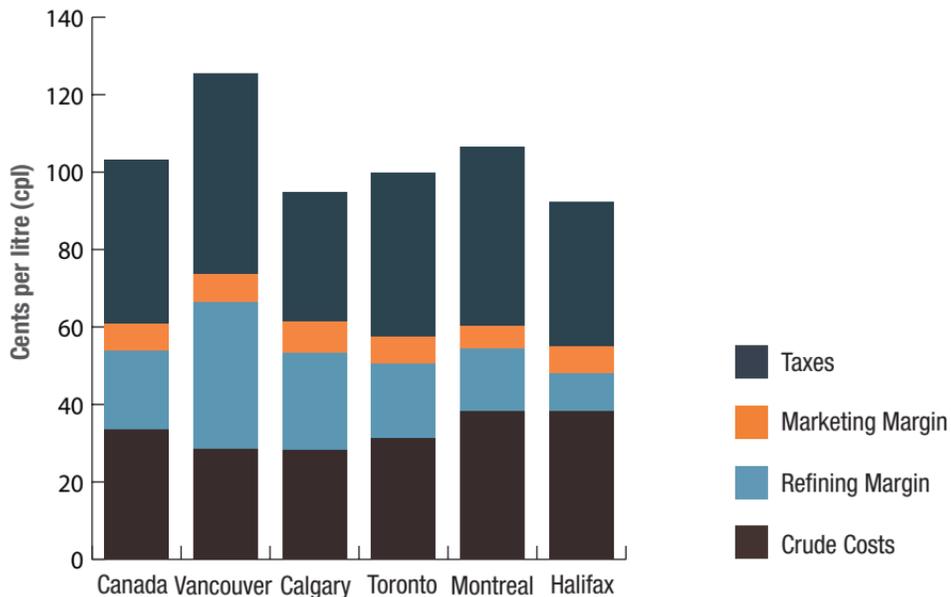


15% of Canadian production of refined petroleum products is exported



RETAIL PRICES

AVERAGE CANADIAN REGULAR GASOLINE PRICES, 2020



REFINERY CAPACITY

CANADIAN PETROLEUM REFINERIES BY COUNT AND CAPACITY*, 2020

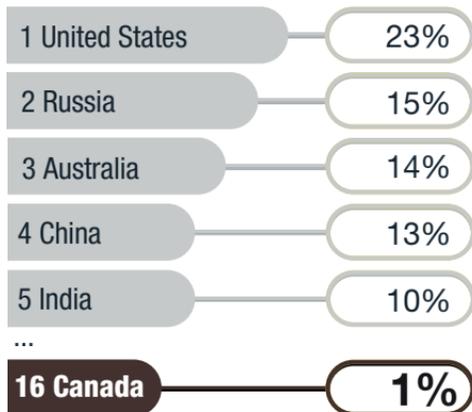
Province	Petroleum refinery		Asphalt plants		Lubricant plants (using crude oil as feedstock)		Total	
	Count	Capacity	Count	Capacity	Count	Capacity	Count	Capacity
Alberta	4	530	-	-	-	-	4	530
British Columbia	2	67	-	-	-	-	2	67
New Brunswick	1	300	-	-	-	-	1	300
Newfoundland and Labrador	1	130	-	-	-	-	1	130
Ontario	4	393	-	-	1	16	5	409
Quebec	2	372	-	-	-	-	2	372
Saskatchewan	1	135	2	52	-	-	3	187
Total	15	1,927	2	52	1	16	18	1,995

*Capacities are in Mb/d.

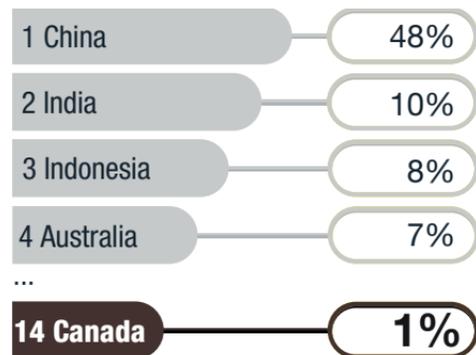
COAL

INTERNATIONAL CONTEXT

**World proved reserves –
1,074 BILLION TONNES** (2020)



World production – 7.4 BILLION TONNES
(2020)

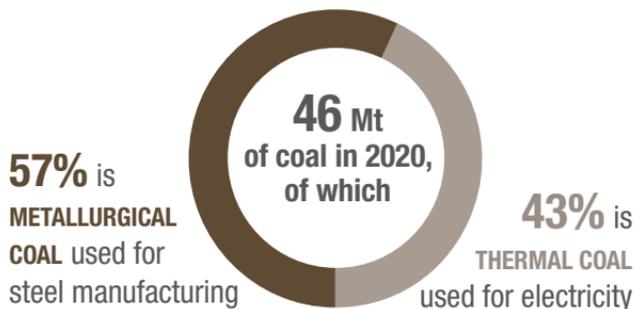


World exports – 1.3 BILLION TONNES
(2020)

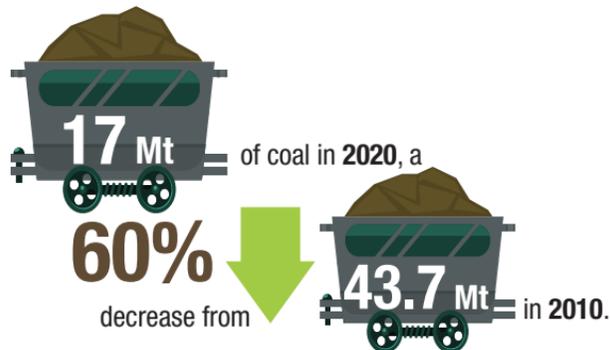


PRODUCTION AND USE

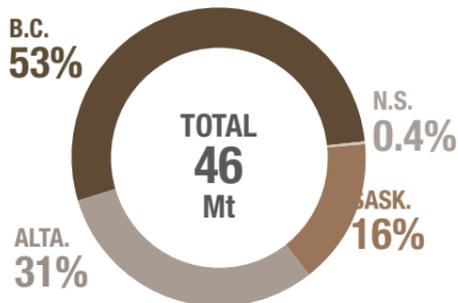
Canada produced



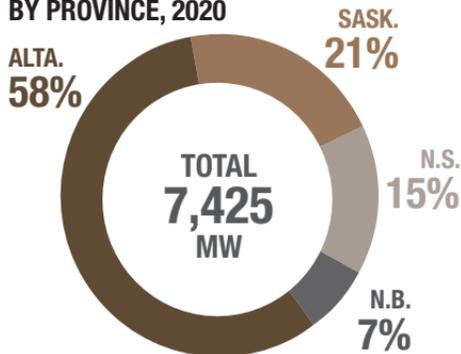
Electricity generation consumed



COAL PRODUCTION BY PROVINCE, 2020



COAL-FIRED GENERATING CAPACITY BY PROVINCE, 2020



DOMESTIC DEMAND



Mostly for electricity generation in Alberta and Saskatchewan

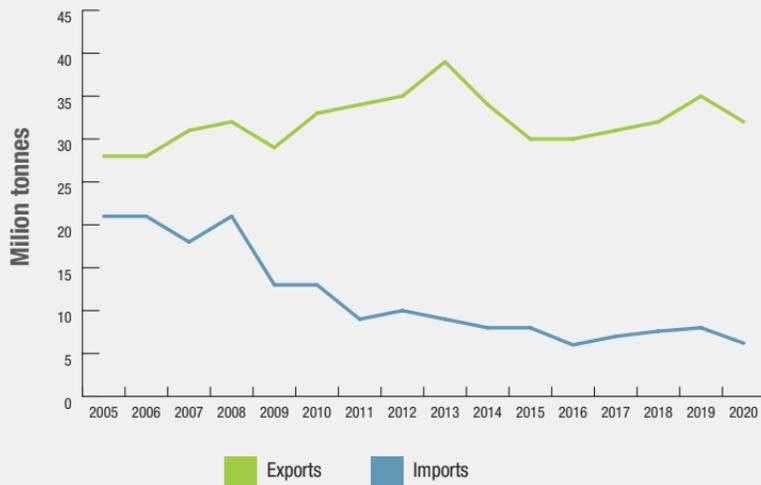


Also for metallurgical applications



TRADE

CANADIAN TRADE OF COAL



Canada's exports are primarily metallurgical coal (**88%** in 2020).

TRADE (2020)

EXPORTS



27% Japan
23% South Korea
14% China

2% of Canadian exports are to the U.S.,
representing **7%** of U.S. coal imports.



IMPORTS



ANNEXES

ANNEX 1: UNITS AND CONVERSION FACTORS

PREFIXES AND EQUIVALENTS

Prefix				
SI/Metric		Imperial	Equivalent	
k	kilo	M	thousand	10^3
M	mega	MM	million	10^6
G	giga	B	billion	10^9
T	tera	T	trillion	10^{12}
P	peta	-	quadrillion	10^{15}

Notes

- Tonne may be abbreviated to “t” and is not to be confused with “T” for tera or trillion.
- Roman numerals are sometimes used with imperial units (this can create confusion with the metric “M”).

CRUDE OIL

Upstream

- reserves usually in barrels or multiples (million barrels)
- production/capacity often in barrels per day or multiples (thousand barrels/day or Mb/d, million barrels/day or MMb/d)
- metric: 1 cubic metre = 6.2898 barrels
- International Energy Agency: uses weight (tonnes) rather than volume

Downstream (petroleum products)

- volumes of refined products usually in litres
- 1,000 litres = 1 cubic metre
- U.S.: 1 U.S. gallon = 3.785 litres

NATURAL GAS

Volume

- reserves/production usually in cubic feet or multiples (billion cubic feet or Bcf, trillion cubic feet or Tcf)
- production/capacity often in cubic feet per day or multiples (Bcf/d, Tcf/d)
- metric: 1 cubic metre = 35.3147 cubic feet

Density

- 1 million t LNG = 48.0279 billion cubic feet

Pricing

Volume-based:

- cents per cubic metre (¢/m³) (customer level in Canada)
- \$ per hundred cubic feet (\$/CCF) (customer level in the U.S.)

Energy content-based:

- \$ per gigajoule (\$/GJ) (company level in Canada)
- \$ per million British thermal units (\$/MMbtu) (company level in the U.S., LNG)

URANIUM

- 1 metric tonne = 1,000 kilograms of uranium metal (U)
- U.S.: in pounds of uranium oxide (U₃O₈)
- 1 lb. U₃O₈ = 0.84802 lb. U = 0.38465 kg U

COAL

- 1 metric tonne = 1,000 kilograms
- U.S.: 1 short ton = 2,000 pounds
- 1 metric tonne = 1.10231 short tons

ELECTRICITY

Capacity

- maximum rated output that can be supplied at an instant, commonly expressed in megawatts (MW)

Total capacity

- installed generator nameplate capacity

Generation/sales

- flow of electricity over time, expressed in watt-hours or multiples:
 - kilowatt-hours or kWh (e.g. customer level)
 - megawatt-hours or MWh (e.g. plant level)
 - gigawatt-hours or GWh (e.g. utility level)
 - terawatt-hours or TWh (e.g. country level)

From capacity to generation

- A 1-MW unit operating at full capacity over one hour generates 1 MWh of electricity.
- Over one year, this unit could generate up to 8,760 MWh (1 MW × 24 hr × 365 days).

- Units are rarely used at full capacity over time because of factors such as maintenance requirements, resource limitations and low demand.
- “Capacity factor” is the ratio of actual generation to full capacity potential.

ENERGY CONTENT

Rather than using “natural” units (e.g. volume, weight), energy sources can be measured according to their energy content – this allows comparison between energy sources.

- metric: joules or multiples (gigajoules or GJ, terajoules or TJ, petajoules or PJ)
- U.S.: 1 British thermal unit (BTU) = 1,055.06 joules
- IEA: energy balances expressed in oil equivalent:
 - thousand tonnes of oil equivalent (ktoe)
 - million tonnes of oil equivalent (Mtoe)

Typical values

- 1 m³ of crude oil = 39.0 GJ
- 1,000 m³ of natural gas = 38.3 GJ
- 1 MWh of electricity = 3.6 GJ
- 1 metric tonne of coal = 29.3 GJ
- 1 metric tonne of wood waste = 18.0 GJ
- 1 metric tonne of uranium = 420,000 GJ to 672,000 GJ

ANNEX 2: ABBREVIATIONS

AECO	Alberta Energy Company	HST	Harmonized sales tax
B	billion	IEA	International Energy Agency
b/d	barrels per day	kg	kilogram
Bcf/d	billion cubic feet per day	km	kilometre
Bcm/d	billion cubic metres per day	km ²	square kilometre
CANDU	Canada deuterium uranium	kt	kilotonne
CCS	carbon capture and storage	kWh	kilowatt hour
CCUS	carbon capture, utilization and storage	lb.	pound
CDIA	Canadian direct investment abroad	L	litre
CEA	Canadian energy assets	LCOE	levelized cost of electricity
CO ₂ equivalent	carbon dioxide equivalent	LNG	liquefied natural gas
CPI	consumer price index	LPG	liquefied petroleum gases
CPL	cents per litre	LWR	light water reactor
ECTPEA	Environmental and Clean Technology Products Economic Account	m	metre
EIA	Energy Information Administration (U.S.)	m ²	square metre
EU	European Union	m ³	cubic metre
FDI	foreign direct investment	Mb/d	thousand barrels per day
G7	seven wealthiest major developed nations: Canada, France, Germany, Italy, Japan, U.K. and U.S.	MJ	megajoule
GDP	gross domestic product	MMb/d	million barrels per day
GHG	greenhouse gas	MMcf/d	million cubic feet per day
GJ	gigajoule	MMbtu	million British thermal units
GST	Goods and Services tax	Mt	million tonnes; megatonne
GWh	gigawatt hours	Mtoe	million tons of oil equivalent
HGL	hydrocarbon gas liquids	MW	megawatt
		NEB	National Energy Board
		NGL	natural gas liquids

NRCan	Natural Resources Canada	RPP	refined petroleum products
NRSA	Natural Resources Satellite Account	SDTC	Sustainable Development Technology Canada
NSERC	National Science and Engineering Research Council of Canada	Tcf	trillion cubic feet
OECD	Organisation for Economic Co-operation and Development	Tcm	trillion cubic metres
PHWR	pressurized heavy water reactor	Tkm	tonne-kilometre
PJ	petajoule	t	tonnes
Pkm	passenger-kilometre	TPES	total primary energy supply
Provinces	Alta. – Alberta	TWh	terawatt-hour
	B.C. – British Columbia	U.K.	United Kingdom
	Man. – Manitoba	U.S.	United States
	N.B. – New Brunswick	US\$	United States dollars
	N.L. – Newfoundland and Labrador	WTI	West Texas Intermediate
	N.S. – Nova Scotia		
	N.W.T. – Northwest Territories		
	Ont. – Ontario		
	P.E.I. – Prince Edward Island		
	Que. – Quebec		
	Sask. – Saskatchewan		
	Y.T. – Yukon		
	Atl. – Atlantic provinces		
	Terr. – Territories		
P/T	provincial/territorial		
PV	photovoltaic		
RD&D	research, development and demonstration		
R&D	research and development		

ANNEX 3: SOURCES

SECTION 1: KEY ENERGY, ECONOMIC AND ENVIRONMENTAL INDICATORS

- **ENERGY PRODUCTION AND SUPPLY**
 - **Global Primary Energy Production:** IEA Annual Database
 - **Global Energy Rankings:** IEA Annual Database
 - **Primary Energy Production by Region & Source:** Statistics Canada tables 25-10-0020-01, 25-10-0029-01 and 25-10-0007-01 and NRCan estimates
 - **Total primary energy supply:** IEA Annual Database, World Energy Balances and IEA Standing Group on Long-Term Co-operation questionnaire
 - **Primary and secondary energy use:** Natural Resources Canada's National Energy Use Database
- **ECONOMIC CONTRIBUTION**
 - **GDP:** Statistics Canada tables 38-10-0285-01, 36-10-0221-01, 36-10-0103-01 and 36-10-0400-01 and NRCan estimates
 - **Employment:** Statistics Canada tables 38-10-0285-01, 36-10-0214-01, 36-10-0489-01, 36-10-0480-01, 36-10-0221-01, 36-10-0400-01, 14-10-0023-01, Provincial NRSA Special tabulation and NRCan estimates
 - **Energy Trade:** Statistics Canada International Merchandise Trade Database, IEA Annual Database and United States EIA (U.S. Imports by Country of Origin)
 - **Canada-U.S. Energy Trade:** Statistics Canada International Merchandise Trade Database and United States EIA (U.S. Imports by Country of Origin)
 - **Government Revenues:** Statistics Canada Table 33-10-0006-01, Statistics Canada special tabulation

(royalties) and Canadian Association of Petroleum Producers, Statistical Handbook, Table 01-01C (Crown land sales Western Canada and Canada lands)

- **ENERGY AND GHG EMISSIONS**
 - **GHG Emissions by Sector:** Environment and Climate Change Canada (National Inventory Report)

SECTION 2: INVESTMENT

- **Capital expenditures:** Statistics Canada tables 34-10-0035-01, 34-10-0036-01, and 34-10-0040-01
- **Canada's Energy Infrastructure:** StatCan Table: 36-10-0608-01: Infrastructure Economic Accounts, investment and net stock by asset, industry, and asset function
- **Canada's Major Energy Projects:** NRCan Major Project Inventory
- **Foreign Direct Investment and Canadian Direct Investment Abroad:** Statistics Canada Table 36-10-0009-01
- **Foreign Control of Canadian Assets:** Statistics Canada tables 33-10-0033-01, 33-10-0005-01 and 33-10-0006-01
- **Canadian Energy Assets:** Compiled by NRCan from S&P Global Market Intelligence and annual financial statements from publicly traded Canadian energy companies.
- **Research, Development and Demonstration**
- **Environmental Protection Expenditures:** StatCan Environmental protection expenditures by businesses, 2018 (Tables 38-10-0130-01, 38-10-0132-01)

SECTION 3: SKILLS, DIVERSITY AND COMMUNITY

- **Energy Sector Demographics:** Statistics Canada Natural Resources Account, special release tables.
- **Household Expenditures on Energy:** Statistics Canada Table 11-10-0222-01
- **Energy Retail Prices:** Statistics Canada tables 18-10-0004-01 and 18-10-0001-01
- **Energy Reliant Communities:** NRCan analysis based on Statistics Canada 2016 Census Data

SECTION 4: ENERGY EFFICIENCY

• ENERGY USE

- **Primary and secondary energy use:** Natural Resources Canada's National Energy Use Database
- **Energy efficiency:** Natural Resources Canada's National Energy Use Database and Natural Resources Canada Energy Efficiency Trends in Canada 2000-2018
- **Energy intensity:** Natural Resources Canada's National Energy Use Database
- **Energy in our daily lives:** Natural Resources Canada's Energy Efficiency Trends in Canada 2000-2018
- **Residential Energy Use, water heating and space heating** Natural Resources Canada's National Energy Use Database and NRCan estimates
- **Residential, commercial, institutional and industrial sectors:** Natural Resources Canada's National Energy Use Database

• ENERGY TRENDS

- **Trends in Energy use and intensity:** Natural Resources Canada's National Energy Use Database

SECTION 5. CLEAN POWER AND LOW CARBON FUELS

• CLEAN TECHNOLOGY AND THE ECONOMY

- **Environmental and clean technology:** compiled by NRCan from Statistics Canada data and other public sources (Toronto Stock Exchange)

• ELECTRICITY

- **World production and exports:** IEA database (Electricity Information [note: IEA production/generation data is expressed on a "gross" basis, i.e. before generating station use])
- **Trade:** NEB Table (Electricity Exports and Imports Statistics), and Statistics Canada.
- **Canadian and provincial supply:** compiled by Statistics Canada and NRCan's Electricity Division from various sources
- **Prices:** Hydro-Québec (Comparison of Electricity Prices in Major North American Cities)
- **Electricity energy use:** Office of Energy Efficiency Comprehensive Energy Use Database.
- **Levelized cost of electricity:** NEB (Canada's Adoption of Renewable Power Sources – Energy Market Analysis)

• RENEWABLES

- **International context – Production:** IEA (Renewables Information)
- **International context – share of energy supply:** IEA (Electricity Information, Energy Balances of OECD Countries, and Energy Balances of Non-OECD Countries) and United States EIA
- **Domestic production:** IEA (Renewables Information) and NRCan data based on Statistics Canada
- **Hydro – international generation:** IEA (Electricity Information, Energy Balances of OECD Countries, and Energy Balances of Non-OECD Countries)

- **Hydro – capacity in Canada:** Statistics Canada Table 25-10-0022-01 and compiled by NRCan
- **Hydro – facilities and projects:** compiled by NRCan from Statistics Canada and other public sources
- **Biomass – Renewable balance:** IEA database (Renewables balances)
- **Biomass – production:** Statistics Canada Table 25-10-0031-01, Statistics Canada International Merchandise Trade Database and NRCan
- **Biomass – wood fuel use by sector:** IEA (Renewables Information)
- **Wind – international context:** Global Wind Energy Council (Global Wind Report)
- **Wind – capacity in Canada:** compiled by NRCan from multiple sources (Canadian Wind Energy Association, Statistics Canada and NRCan)
- **Wind generation in Canada:** Statistics Canada Table 25-10-0020-01
- **Wind – wind farms:** compiled by NRCan from Statistics Canada data and other public sources (including Canadian Wind Energy Association)
- **Solar PV – international context:** Renewable Energy Policy Network for the 21st Century (Renewables 2020 Global Status Report)
- **Solar PV – capacity in Canada:** IEA and compiled by NRCan
- **Solar PV – generation in Canada:** Statistics Canada Table 25-10-0020-01
- **Solar PV – solar PV farms:** compiled by NRCan from Statistics Canada data and various public sources
- **URANIUM AND NUCLEAR**
 - **Biofuels – regulations:** compiled by Office of Energy Efficiency from various public sources
 - **World uranium production and exports:** World Nuclear Association (World Uranium Mining) and NRCan estimates based on World Nuclear Association production data
 - **World known recoverable resources of uranium:** OECD Nuclear Energy Agency and International Atomic Energy Agency (Uranium: Resource, Production and Demand), World Nuclear Association (Supply of Uranium)
 - **World generation of nuclear power:** International Atomic Energy Agency (Nuclear Power Reactors in the World, 2020 Ed.)
 - **Canadian supply and demand:** World Nuclear Association (Uranium in Canada), Cameco Annual report and estimates compiled by NRCan from company information
 - **Nuclear in Canada infographic:** NRCan website (Nuclear Energy and Uranium)
 - **Purchases by U.S. nuclear reactors:** United States EIA (Uranium Marketing Annual Report) Table 3 (Uranium purchased by owners and operators of U.S. civilian nuclear power reactors by origin country and delivery year)
 - **CANDU nuclear reactors:** Based on figures compiled by NRCan
 - **Nuclear power plants in Canada:** Compiled by NRCan from Statistics Canada Table 57-206, International Atomic Energy Agency Power Reactor Information System and other public sources
 - **Spot prices:** United States EIA Annual Uranium Market Report
- **BIOFUELS AND TRANSPORTATION**
 - **Biofuels – regulations:** compiled by Office of Energy Efficiency from various public sources

- **Biofuels – international context:** IEA (Renewables Information)
- **Biofuels – production, supply and demand :** Compiled by NRCan from a variety of sources
- **Transportation – Electric vehicle sales:** Statistics Canada Table: 20-10-0021-01
- **Transportation – GHG emissions:** Environment and Climate Change Canada
- **Hydrogen – Hydrogen Strategy For Canada,** <https://www.nrcan.gc.ca/climate-change/canadas-green-future/the-hydrogen-strategy/23080>

SECTION 6: PETROLEUM, GAS AND COAL

• CRUDE OIL

- **World production and exports:** IEA Online Data Services (Crude Oil Information)
- **World proved reserves:** Oil and Gas Journal (Worldwide Look at Reserves and Production)
- **Canadian Resources:** Canadian Association of Petroleum Producers Statistical Handbook tables 2.6 (Crude Oil Remaining Established Reserves) and 2.1a (Crude Reserves) Alberta Energy Regulator ST98 (Alberta's Energy Reserves and Supply/Demand Outlook), tables R4.5 (Conventional crude oil reserves as of each year-end), R4.1 (Reserve and production change highlights) and 1 (Resources, reserves and production summary)
- **Wells completed and metres drilled in western Canada:** Canadian Association of Petroleum Producers, Statistical Handbook, Wells and Metres Drilled in Western Canada (2020 Drilling Activity)
- **Canadian and provincial production:** Statistics Canada Table 25-10-0063-01 and NRCan analysis
- **Canadian Supply and Demand:** Statistics Canada Table 25-10-0063-01 and Statistics Canada International Merchandise Trade Database, United States EIA (Imports by Country of Origin, Refining and Processing, total crude oil and products, consumption/sales)
- **Trade:** Statistics Canada table 25-10-0063-01 and Statistics Canada International Merchandise Trade Database, U.S. EIA (Imports by Country of Origin, Refining and Processing, total crude oil and products, consumption/sales)
- **Oil Sands:** Canadian Association of Petroleum Producers, Statistical Handbook, Table 04-14 (Canada Oil Sands Expenditures), Statistics Canada tables 34-10-0036-01 and 25-10-0063-01, Alberta Energy Regulator ST98 (Alberta's Energy Reserves and Supply/Demand Outlook) table S3.1 (Crude bitumen production), Canada's Oil Sands Innovation Alliance, CanOils Database and NRCan analysis
- **Prices:** United States EIA tables (Spot Prices for Crude Oil) and Sproule
- **Pipelines:** compiled by NRCan
- **Transportation by Rail:** CER (Canadian Crude Oil Exports by Rail – Quarterly Data) , Statistics Canada table 23-10-0062-01 and various sources
- **Oil Sands Environmental Considerations:** NRCan compiled using Environment and Climate Change Canada (National Inventory Report 1990 to 2019: Greenhouse Gas Sources and Sinks in Canada), World Resources Institute (CAIT - Country Greenhouse Gas Emissions Data), Alberta Government (Oil Sands Information Portal), Alberta Energy Regulator, Statistics

Canada, NRCan Boreal forest website, Alberta Government Lower Athabasca Regional Plan and Canadian Association of Petroleum Producers (Frequently used statistics)

• **NATURAL GAS**

- **World production and exports:** IEA (Natural Gas Information)
- **World proved reserves:** U.S. EIA, International Data Browser
- **World unproved technically recoverable shale resources:** U.S. EIA, World Shale Resource Assessments
- **World resources and technically recoverable resources:** IEA (World Energy Outlook 2017, 2014 and 2013) tables 5.3 (Remaining technically recoverable natural gas resources by type and region), 8.2 (Remaining technically recoverable natural gas resources by type) and 3.3 (Remaining technically recoverable natural gas resources by type and region) and Oil and Gas Journal (Worldwide Look at Reserves and Production)
- **Canada and US proved reserves:** U.S. EIA and O&G Journal, extracted from EIA International Data Browser
- **Marketable and technically recoverable resources:** CER Energy Future Report, EIA Annual Energy Outlook, Assumptions to AEO - Oil and Gas Supply Module, EIA Shale gas proved reserves, IEA World Energy Outlook
- **Canadian production and share of conventional versus unconventional production:** StatCan Table: 25-10-0055-01 Natural gas supply and disposition and CER Energy Futures, Natural Gas Production by Type
- **US production and share of conventional versus unconventional production:** U.S. EIA, Dry Natural Gas Production, Annual and US EIA Annual Energy Outlook
- **LNG Imports of North American countries:** CER LNG Imports and Exports, U.S. EIA Liquefied Natural Gas Imports and Exports, Annual, and IGU World LNG Report

- **Natural gas wells completed and average metres drilled:** CAPP, Statistical Handbook
 - **Canadian trade of natural gas:** CER Exports and Imports of Natural Gas
 - **Marketable Production by Province:** StatCan Table: 25-10-0055-01 Natural gas supply and disposition
 - **Prices:** Sproule Price Forecast
 - **Pipelines:** Canada Energy Regulator
 - **Natural gas energy use:** NRCan Office of Energy Efficiency, National Energy Use Database
 - **Consumption:** Statistics Canada Table 25-10-0030-01 and IEA Annual Mini-Questionnaire
- #### • **HGLs**
- **Processing plant production:** StatCan Table 25-10-0036-01 - Supply of natural gas liquids and sulphur products from processing plants
 - **Refinery production:** Gross production of HGLs from StatCan Monthly Refined Petroleum Product Survey
 - **Shares of NGL Production by province:** CAPP Statistical Handbook
 - **NGLs end use:** NRCan Office of Energy Efficiency, National Energy Use Database
- #### • **RPPs**
- **Canadian refineries:** compiled by NRCan (from company information, Conference Board of Canada, Canada's Petroleum Refining Sector Canadian Fuels Association, Canadian Association of Petroleum Producers, Oil Sands magazine and CanOils Database)
 - **Supply and Demand:** Statistics Canada Tables, 25-10-0063-01 and 25-10-0081-01 and NRCan Analysis

- **Crude oil shipped to domestic refineries:** Statistics Canada table 25-10-0063-01
- **Domestic consumption by product:** Statistics Canada table 25-10-0081-01 and analysis by NRCan
- **Trade:** Statistics Canada Table 25-10-0081-01, United States EIA (U.S. Imports by Country of Origin for Petroleum and Other Liquids) and Statistics Canada International Merchandise Trade Database
- **Gasoline prices:** Kent Group Ltd (average retail prices for regular gasoline and diesel fuel) and data compiled by NRCan
- **Refinery capacity:** Oil sands magazine and estimates compiled by NRCan
- **COAL**
 - **World proved reserved:** World Energy Council (BP Statistical Review of World Energy)
 - **World production and exports:** IEA (Coal Information)
 - **Canadian supply and demand:** Public provincial data sources, Statistics Canada table 25-10-0017-01, Statistics Canada International Merchandise Trade Database, public sources and NRCan estimations
- **GHG EMISSIONS FROM PETROLEUM**

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