

### OUR VISION

**Advocate** to governments, policy makers and regulators.

**Communicate** our association's views to the public, and media.

**Educate** Canadians about our energy industry.

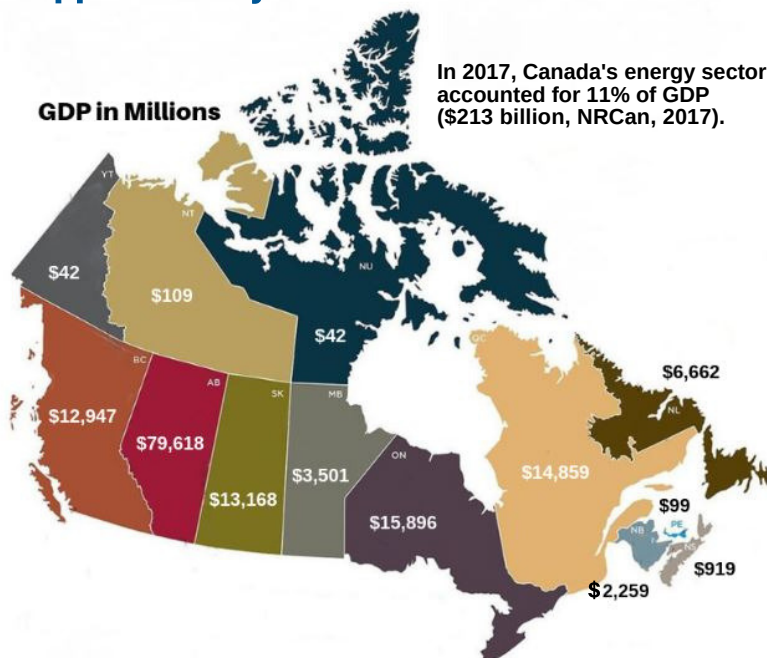
### EPAC IS THE VOICE

of Canada's **entrepreneurial** energy producers and advocates on behalf of its members for sound government policy that promotes a thriving energy sector.

The association represents over **170** member oil and gas companies ranging from start-ups to juniors and large producers operating in Canada. EPAC's focus is on non-oil sands and gas development.

These companies are the engine of the industry as members invest billions of dollars each year developing new energy reserves while providing the North American market with a secure, reliable energy source. EPAC members produce **35%** of Canada's natural gas and **30%** of Canada's conventional oil. EPAC members manage over **\$150 billion** in assets.

### The oil and gas sector accounts for approximately 11% of Canada's GDP



- The energy sector is the biggest **net contributor** to Canada's balance of trade with the rest of the world.

### In 2017, Canada's energy sector employed more than 276,000 people

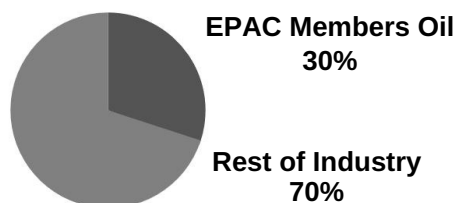
Alberta.....	146,776
British Columbia.....	22,043
Saskatchewan.....	17,789
Manitoba.....	5,651
Ontario.....	42,618
Quebec.....	28,176
New Brunswick.....	4,771
Nova Scotia.....	2,448
Newfoundland and Labrador.....	5,139
Prince Edward Island.....	324
Northwest Territories.....	257
Nunavut.....	245
Yukon.....	195



**and indirectly supported more than 624,000 jobs across Canada** (NRCan, 2017)

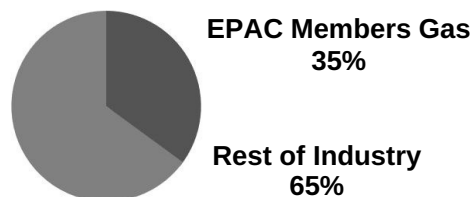
## EPAC members' share of Canada's oil production (ex-oil sands)

(XI Technologies)



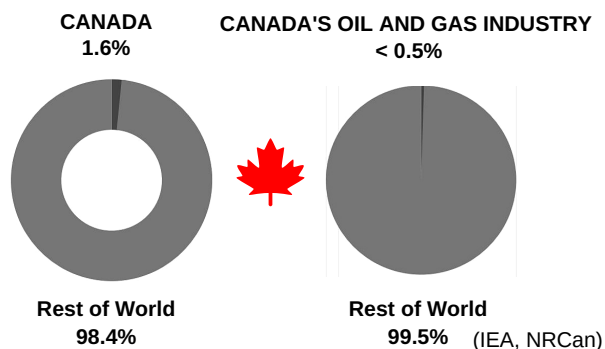
## EPAC members' share of Canada's natural gas production

(XI Technologies)



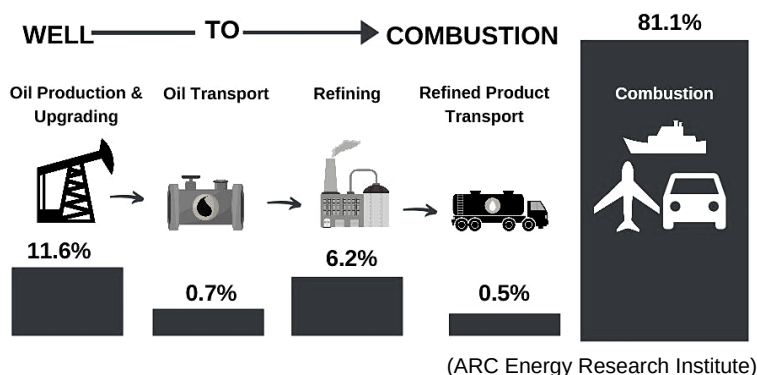
## Canada's carbon emissions in comparison to the world

- Canada accounts for **1.6%** of world's CO<sub>2</sub> emissions (down from **2.0%** in 2015).
- Canada's oil and gas industry represents less than **0.5%** of world CO<sub>2</sub> emissions.



## Well-to-combustion GHG emissions crude oil

- **81%** of CO<sub>2</sub> emissions from a barrel of oil are from the **consumption** of petroleum products.



## Canada has among the world's highest environmental, social and governance standards

- ESG Ratings by major oil producing country.

