



Being Resourceful
With Our Resources

CAPP CANADA'S OIL & NATURAL GAS
PRODUCERS

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Oil and Natural Gas are part of our every day life

TOOTHBRUSH CONTACT LENSES
 MAKEUP TOOTHPASTE COLOGNE LIP BALM **SOAP**
 SHAMPOO **MOISTURIZER** COMB
 SHAVING CREAM DEODORANT ASPIRIN VASELINE
NAIL POLISH HAIR BRUSH CDS & DVDS TOILET SEAT
 CLEANING SUPPLIES GEL SHOWER CURTAIN
 HAIR BRUSH EYE GLASSES EYE LINER HAIR SPRAY
 SUNSCREEN MASCARA BOTTLES FOUNDATION
 EYE SHADOW AMMONIA HEARING AIDS **DENTURES**
 BODY LOTION COMPUTERS MAKEUP REMOVER
 HEART VALVES **SMART PHONES**
 ELECTRONICS ACCESSORIES TIRES CONDITIONER
MEDICAL SUPPLIES DISHWASHING LIQUID

Impact of falling oil prices on Canada's energy sector

100,000 jobs lost to date



\$33 Billion dollar decline in capital investment

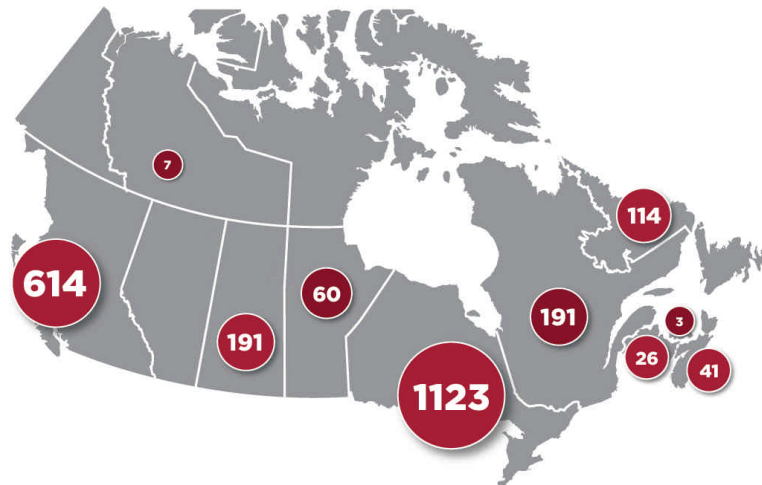


\$60 Billion dollar decline in earnings



Oil & gas creates jobs across Canada

More than 2,000 companies across Canada have direct business with the oil sands



Change & Disruption Around the World



Price Influencers:



USA



SAUDI ARABIA



IRAN



RUSSIA

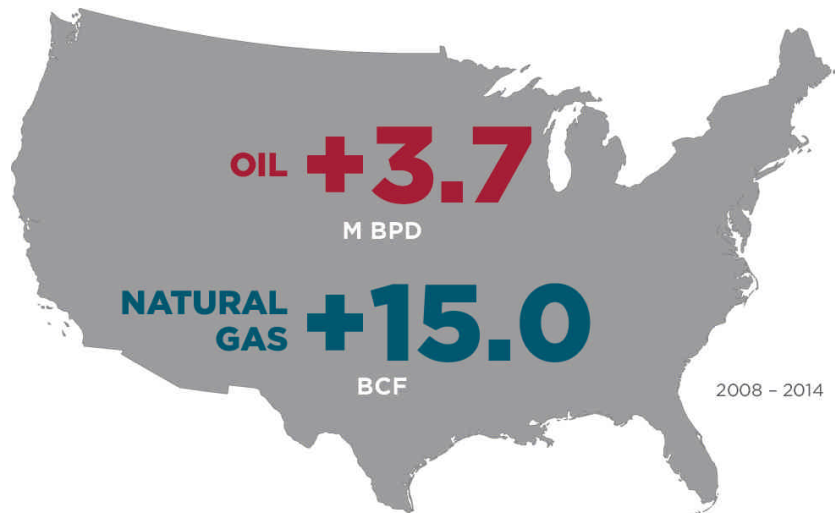


MEXICO



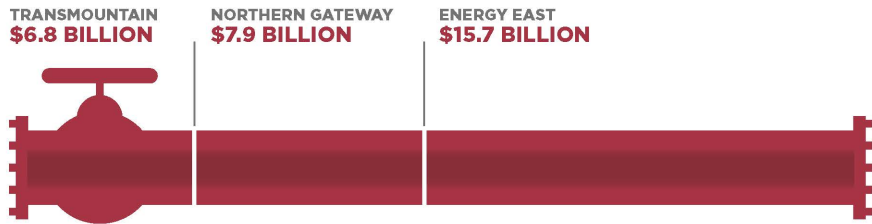
CHINA

Our biggest customer is our biggest competitor

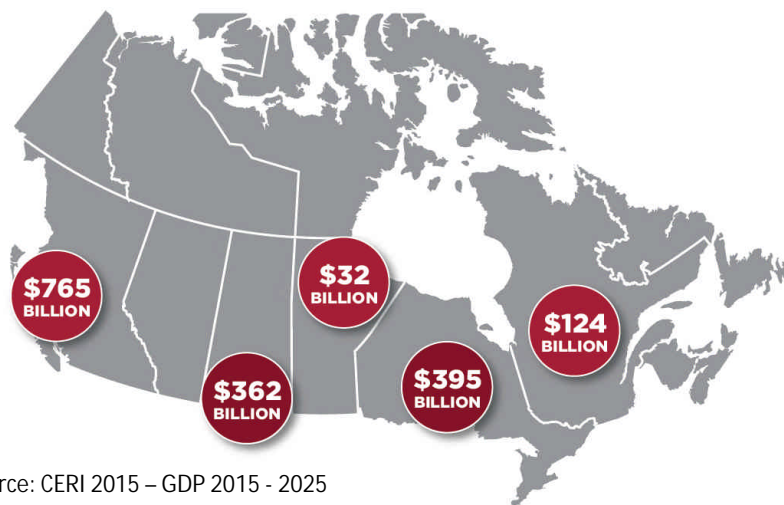


Pipelines = economic infrastructure

\$30 billion in private capital investment to grow Canada's economic capacity



Future Impact to Canadian Economy



Source: CERI 2015 – GDP 2015 - 2025