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AUGUST 2022

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**GOVERNMENT POLICY
AND INDUSTRY UPDATES**

ADVOCACY CORNER

SECTOR NEWS UPDATES



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MISSION

CEMA's mission is to support and elevate Canada's small and medium-sized energy marketers, who are responsible for nearly 100,000 direct and indirect jobs across the country and are deeply committed to ensuring that innovative energy products, including low-carbon transportation solutions, are readily available to Canadian consumers.

CEMA ensures the voices of its membership are heard at all three levels of government in a fair, consistent and advocacy-first manner – members who include progressive leaders responsible for the distribution of diverse products like gasoline, diesel, heating oil, propane and aviation fuel, as well as low-carbon transportation energy solutions including renewable fuels and electric vehicle charging stations across a vast geography, to diverse industries, and to millions of Canadian consumers.

STAYING CONNECTED

CEMA CONNECTION
2022 EVENTS, PODCASTS, WEBINARS

PODCAST ROAD CHATS NOW AVAILABLE

We're busy preparing for the first episode of Season 3 of Road Chats. In the meantime, why not catch up on the episodes you missed from Seasons 1 and 2? There have been so many great guests, with insights that are just as relevant now as they were when the podcasts were recorded. Listen [here](#).

CEMA GOLF CHALLENGE SEPTEMBER 26, 2022

Glen Abbey Golf Club in Oakville, Ontario
90% SOLD OUT
Deadline to register is Friday, September 16
[REGISTER HERE](#)

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GOVERNMENT POLICY AND INDUSTRY HIGHLIGHTS

This update serves as a recap and reference point for our members regarding the latest policy impacts on the energy market as well as industry trends. We will continue to monitor and communicate any policy changes directly to members as they happen.

NATIONAL POLICY & RESEARCH UPDATES

'Techno-Economics of a New Hydrogen Value Chain Supporting Heavy Duty Transport'

In the transition to a net-zero future, fuel hydrogen is envisioned to play a key role as a zero-

emission carrier. The successful buildout of a fuel hydrogen economy will require the creation of new value chains that make hydrogen available at a reasonable cost at widely distributed locations across Canada. **This report** by the Transition Accelerator presents the design and techno-economic analyses of new value chains for delivering hydrogen from centralized production sites to fueling stations supporting heavy-duty vehicles in Canada, describing opportunities for decarbonization and economic growth.

The missing bioeconomy link in Canada

Just about everything we consume that comes from a barrel of oil – from transport fuel to heating and cooling, to personal care products – **could instead come from biomass**, says Jeff Passmore, founding chair of Scaling Up, Canada's annual industrial bioeconomy business conference. He notes that 60 countries have national bioeconomy strategies, but Canada is not among them. Passmore says Canada could be a world leader in the bio-based economy, but it requires a strategy to provide capital markets with the right signals to catalyze bio-based investment. "As a minimum, it needs to implement a federal bioproducts procurement policy similar to the American Bio-Preferred Program," he adds.

Federal consultation on the Development of Fuel, Alcohol and Cannabis and Tobacco Sales Tax Framework for Indigenous Governments

On August 9, Finance Canada launched a public consultation on the development of a Fuel, Alcohol, Cannabis and Tobacco (FACT) Sales Tax Framework for Indigenous Governments. Design aspects being considered in the consultation include: The application and administration of a FACT sales tax framework; coordination with existing federal goods and services tax (GST); the possibility to tax only one product instead of all four; the methodology used to calculate the tax collected (e.g., actual sales or a formula-based approach); and the design of a Revenue Sharing Mechanism (RSM). The Department of Finance published a **Discussion Paper** to facilitate the conversation and development of a framework. The public consultation closes on January 15, 2023. Written feedback and comments can be provided to the Department of Finance, Tax Policy Branch by writing to FACT-CACT@fin.gc.ca.

PROVINCIAL & TERRITORIAL POLICY TRENDS

PRAIRIE REGION

It's good to be green – canola cleared under new 'clean fuel' regulations

Farmers are closer to having a major new canola market – large-scale biofuel production – following the release of federal Clean Fuel Regulations intended to reduce greenhouse gas emissions. The regulations indicate **prairie growers have finally made the cut** after years of negotiations between canola industry representatives and government. Canola is now fully accepted as sustainable and compliant with federal land use and biodiversity standards.

Saskatchewan handing out cheques, scaling back taxes as rising oil, potash prices drive rise in revenue

Saskatchewan is flush with cash and out of the red

after it brought in nearly \$2 billion during the first three months of the year, mostly from rising oil and potash prices. With excess cash in hand, and what is projected to be first balanced budget in about seven years, the Saskatchewan Party government said it's **time to share the wealth**. Premier Scott Moe announced August 22 that his government would begin by handing out \$500 cheques to 900,000 residents this fall. To qualify for the one-time rebate, residents have to be 18 or older and must have last year's income tax return filed by October 31.

ONTARIO/QUEBEC REGION

Québec's low-carbon-intensity fuel content requirement to start in 2023

On December 1, 2021, the Government of Québec adopted by Order in Council 1502-2021 the Regulation respecting the integration of low-carbon-intensity fuel content into gasoline and diesel fuel (the Regulation), which came into force on December 15, 2021. The Regulation provides for the integration of low-carbon-intensity fuel content of 10 per cent in gasoline and 3 per cent in diesel starting **January 1, 2023**, and gradually increasing to 15 per cent in gasoline and 10 per cent in diesel by January 1, 2030, except where otherwise stipulated by the Regulation. The Regulation is intended to reduce GHG emissions and also to support and promote the development of the emerging bioenergy sector in Québec.

Ontario Speech from the Throne

On August 9, Ontario Lieutenant Governor Elizabeth Dowdeswell read the government's **Speech from the Throne**. The government remains focused on making Ontario a significant player in the manufacturing of zero-emission vehicles (ZEV) and on developing the critical minerals sector to support ZEV manufacturing at home and abroad. It was also able to cut provincial gas taxes by as much as 10 cents per litre thanks to the temporary gas tax holiday and the elimination of the cap and trade system.

Agreement with German automakers 'unprecedented' for Canada, says auto industry insider

On August 23 the **federal government announced** it had reached agreements with Volkswagen

and Mercedes-Benz that would help the German automakers secure access to the critical minerals needed for electric vehicle batteries. Those critical minerals – such as lithium, nickel, cobalt and graphite – are primarily found in parts of northern Ontario and northern Quebec. Flavio Volpe, president of the Automotive Parts Manufacturers' Association, said the agreements send a signal to other car manufacturers that northern Ontario and northern Quebec are the places to access critical minerals if they want to qualify for new electric vehicle tax credits in the U.S.

BIC wins \$1.8M to support development of biomass standards

The Canadian government on August 3 **awarded \$1.8 million** under Agriculture and Agri-Food Canada's AgriAssurance Program to Bioindustrial Innovation Canada, a nonprofit group based in Ontario that supports the commercialization of sustainable technologies. BIC will work with Biomass Quality Network Canada to develop research-based standards for measuring and assessing the quality of bioproducts made from agricultural sources.

ATLANTIC CANADA

Germany taps 'boundless' fuel potential in Canada Hydrogen Deal

Canada intends to **start shipping green hydrogen** produced by wind farms to Germany by 2025, the first step in a partnership to help Europe's biggest economy reduce its reliance on fossil fuels. Canadian Prime Minister Justin Trudeau and German Chancellor Olaf Scholz signed a five-year hydrogen accord on August 23 in Newfoundland and Labrador. The gaseous fuel, which burns hot enough to be used for making steel, is seen playing a key role in curbing industrial emissions, as well as eventually powering cars, trucks and ships. Speaking earlier in the day at a business conference in Toronto, Scholz said Canada "has almost boundless potential to become a superpower in sustainable energy and sustainable resource production."

Premier pitches 'made-in-Nova Scotia plan' as alternative to federal carbon tax

Premier Tim Houston **unveiled Nova Scotia's alternative to a federal carbon tax** August 19. The

thrust of the province's plan is to allow the province to continue to bring down GHG emissions using a combination of hydroelectricity from Muskrat Falls and a big new chunk of wind power that would come online by 2025. In a letter from the premier's office to federal Environment and Climate Change Minister Stephen Guilbeault, Houston argues Nova Scotia should be exempted from charging the carbon tax because it can meet – or possibly exceed – the federal 2030 target of reducing GHG emissions by 40-45 per cent below 2005 levels in a way that costs Nova Scotian families less money. Read the **letter here**.

NORTHERN REGION

University of Calgary research program set to visit Yukon; Studying corridors and transportation

A research program based out of the University of Calgary was in the Yukon in late August to hear what territorial residents think about **improving transportation corridors**. Doctor Kent Fellows, lead researcher on the program, explained his group was inviting people to talk about setting up corridors like roads, pipelines and transmission lines, with the dialogue set to help drive decision-making and future research led by the School of Public Policy.

Looking to the future: City of Whitehorse releases 20-year plan

After four years of work, the City of Whitehorse **could have a new guide in place by the end of the year**, for everything from increased building heights and possibilities for new development areas. The proposed Official Community Plan (OCP) was presented at Whitehorse city council's August 1 meeting with December 12 cited as a potential date for full adoption of the 20-year plan for the city. There's a long list of proposed policy changes under nine different themes, including climate action and environmental stewardship, and transportation and mobility. Council members emphasized that while a lot of public input went into the proposed OCP, there is still time for residents to have their say on the plan. Residents can visit **<https://www.engagewhitehorse.ca/ocp>** to view the proposed document. Written submissions can be emailed to **publicinput@whitehorse.ca**

GLOBAL RESEARCH TRENDS

New faster charging hydrogen fuel cell developed

Researchers from the University of Technology Sydney and Queensland University of Technology have **developed a new method** to improve solid-state hydrogen fuel cell charging times. The study, "Design optimization of a magnesium-based metal hydride hydrogen energy storage system," was recently published in the journal Scientific Reports. The researchers developed a semi-cylindrical coil as an internal heat exchanger, which significantly improved heat transfer performance. The hydrogen charging time was reduced by 59 per cent when using the new semi-cylindrical coil compared to a traditional helical coil heat exchanger. Read the study [here](#).

California to ban sales of new gas-powered cars by 2035: Report

California was expected to put into effect on August 25 its sweeping plan to prohibit the sale of new

gasoline-powered cars by 2035, a **groundbreaking move** that could have major effects on the effort to fight climate change and accelerate a global transition toward electric vehicles. The rule, issued by the California Air Resources Board, will require that 100 per cent of all new cars sold in the state by 2035 be free of the fossil fuel emissions chiefly responsible for warming the planet, up from 12 per cent today. It sets interim targets requiring that 35 percent of new passenger vehicles sold in the state by 2026 produce zero emissions. That would climb to 68 per cent by 2030.

Webinars discuss biofuels policy, sustainability in transportation

Two Fuels Institute webinars, held on July 28 and August 2, offer rich insights into sustainability in transportation and biofuels policy respectively. In the first, three guests discuss the future of sustainable transportation, including policy, innovation and infrastructure. The second is a discussion of the Fuels Institute's recent white paper, **Assessment of Biofuels Policy: Effectiveness of Emissions Reductions**. You can view the recordings [here](#).

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chats 

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ADVOCACY CORNER

The Advocacy Corner is featured in the newsletter on a monthly basis. We will continue to monitor and track all policy-related issues that matter to you, our members, as Parliament resumes in September.

The Dog Days Are Over

The summer barbecue circuit is coming to a close and MPs are starting to get ready to head back to Ottawa for what promises to be a very interesting fall session of the House of Commons.

By the time MPs come back, new dynamics will be in play. The 'smart money' is betting on Pierre Poilievre to be the Leader of the Conservative Party of Canada and Official Opposition by that point, the NDP will be clinging to relevance by continuing with their veiled threats to break from their Confidence and Supply pact with the Liberals, and there are increasing whispers that a shakeup could be coming to the federal cabinet.

We expect retail gasoline prices to be a major focus of the Conservatives, who will craft their entire fall economic narrative around Canada's cost of living crisis.

Oil & Gas Emissions Cap

On the heels of the tabling of the final Clean Fuel Regulations, the government quietly announced this summer the next steps in developing an emissions cap for the oil and gas sector.

In promising that the cap on emissions for the oil and gas sector will be complementary to existing measures and aligned with other actions (including carbon pricing and the clean fuel regulations), the government intends to cut the sector's emissions in half by 2030, to levels last seen in 1992.

The government has proposed two options for implementing a cap on the sector's emissions:

- A) To introduce a new cap-and-trade system, and
- B) To modify the carbon pricing regime.

And while it remains to be seen how broadly across the sector an emissions cap will be applied, the government has signalled that the cap under either model would be applied only to the upstream component of the supply chain, meaning natural gas transmission pipelines and petroleum refineries would not be included under the cap. The government is consulting on the proposed model, and whether the downstream should be captured under the cap, until September 30, 2022.

Energy Politics

While the Prime Minister dismissed the idea of Canada exporting LNG to Germany and Europe in the near term, he didn't dispel the notion that Canada should ship more LNG to Europe in the wake of the Russian invasion of

Ukraine and subsequent energy crisis in Germany.

In fact, Trudeau remarked that if a clear business case were presented to ship LNG from Canada's East Coast to Germany, the federal government would have a role to play in accelerating regulatory approvals for proponents interested in developing new LNG export facilities, such as one that has been discussed in Saint John.

The openness to LNG signals that the federal government might be realizing its environmental agenda isn't feasible given global realities – and it is possible that this logic could apply to domestic policies as well.



CEMA
Golf Challenge

SEPTEMBER
26TH 2022

GLEN ABBEY GOLF CLUB
OAKVILLE, ONTARIO

90% sold out!
Registration closes
September 15

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NEWS UPDATES

The following section is a summary of the top media headlines and coverage of key policy and issues impacting the transportation fuel marketing space. Please note that all orange text in the following section is hyperlinked. If viewing electronically, you can click to read full articles directly from the publication source.

GLOBAL

[HOW CLIMATE-FRIENDLY GASOLINE MAY YET HAVE A PLACE IN OUR EV FUTURE](#)

European Parliament lawmakers voted in June to phase out internal combustion cars by 2035, but there will likely still be millions of gas-burning cars on the road when that date comes. Some European automakers believe the remaining tailpipes could be given a pass if they're powered with carbon-neutral electrofuel (e-fuel).

[GERMANY TO LOWER SALES TAX ON GAS TO 7% IN BID TO RELIEVE CONSUMERS](#)

Germany will lower the sales tax on gas to 7 per cent in an effort to cushion the blow of additional charges being placed on consumers to ensure energy companies can afford increasingly expensive supplies, said Chancellor Olaf Scholz on August 18. The reduced tax rate will apply as long as the levy is charged, meaning through March 2024.

[RUSSIAN OIL PRODUCTION FALLS LESS THAN 3% AS SANCTIONS HAVE 'LIMITED' EFFECT](#)

Russian oil production has fallen by less than 3 per cent since the invasion of Ukraine, the International Energy Agency has found. They say this indicates that western energy sanctions are having only a "limited" effect. In its latest monthly oil report, the IEA said Russia's oil production in July was 310,000 barrels a day below prewar levels.

WINTER DIESEL SHOCK LOOMS AS TANKS DRY UP AHEAD OF SANCTIONS

Europe is heading into winter with seasonally low levels of diesel in storage tanks. Diesel, along with other distillate fuels such as heating oil and gasoil, are the lifeblood of industry with uses ranging from powering factories to heating homes, in addition to being used as a motor fuel.

SHELL SLASHES REFINERY OUTPUT IN EU AS DROUGHT DISRUPTS TRANSPORTATION

Shell slashed its refinery output at its Shell Energy and Chemicals Park Rhineland fuel-making facility as low Rhine River levels halted the flow of goods, the company said on August 18. The catastrophe from low water levels in Europe's Rhine River, the key waterway for barge transportation, is threatening to choke off the flow of coal and petroleum products.

WASTE-BASED BIOFUELS COULD BE THE KEY TO UNLOCKING THE ENERGY TRANSITION

Waste-based biofuels could be a key driver of the energy transition, according to a new report. Developing new technologies that drive biofuel production could supply an additional 20 million barrels per day of liquid biofuel by 2050, satisfying a quarter of all future liquid fuel demand.

RENEWABLE, GREEN FUEL STARTUPS AIM TO DISRUPT INDIA'S EMISSIONS

Over 3,300 startups are now working in the renewable energy sector in India, and many of them are involved in the green fuel sector to reduce carbon emissions. This article highlights a few of the innovative entrepreneurs' offerings.

UNITED STATES

U.S. INFLATION REDUCTION ACT WILL HAVE MIXED IMPACT ON OIL, GAS MARKETS

The Inflation Reduction Act signed into law on August 16 contains multiple provisions impacting the energy industry in the U.S. This article describes how traders and investors in energy and related companies can expect the legislation to impact oil, natural gas and energy equities through tax credits for carbon capture, hydrogen, biofuel and EV initiatives and methane fees.

EPA AG ADVISER TELLS ETHANOL INDUSTRY AUDIENCE BIOFUELS WILL CONTINUE TO GROW

EPA Senior Adviser for Agriculture Rod Snyder told an audience at the American Coalition for Ethanol Conference in Omaha on August 12 that the agency continues to believe an all-the-above approach to reducing carbon emissions is needed. He said the EPA is developing a revised Renewable Fuel Standard assessment for renewable fuels.

U.S. OIL REFINERS, PIPELINE COMPANIES EXPECT STRONG DEMAND FOR REST OF 2022

U.S. oil refiners and pipeline operators expect energy consumption to be strong for the second half of 2022, even though analysts and industry watchers have worried that demand could falter if the global economy enters a recession or high fuel prices deter travelers, according to a Reuters review of company earnings calls.

US OIL AND GAS PRODUCTION TO SET NEW HIGHS IN SEPTEMBER

The Permian basin and the Haynesville shale are leading increases in US oil and gas production, the US Energy Information Administration (EIA) said in its monthly drilling productivity report. The EIA estimates that oil production will exceed 9 million barrels per day in September, an increase of more than 141,000 bpd over August's estimated totals.

3RD GENERATION FUEL, THE REAL ALTERNATIVE TO FOSSIL FUELS

Thermal engines have a future with green fuel. After 1st generation biofuels produced from food plant matter (rapeseed, sunflower, cereals, etc.) and 2nd generation biofuels produced from lignocellulosic biomass (wood, straw), a 3rd generation is emerging – one that produces biodiesel from vegetable oil produced by microalgae.

PACCAR TO OFFER CUMMINS X15 NATURAL GAS ENGINE

Paccar Inc. announced it will offer the new Cummins Inc. X15N natural gas engine in its Kenworth and Peterbilt truck brands. The X15N is the first natural gas engine to be specifically designed for heavy-duty truck applications with up to 500 horsepower. The engine will be integrated with the Cummins clean fuel technologies fuel delivery system.

CANADA

NEW CAPP PRESIDENT TAKES OVER HELM DURING A COMPLICATED ENERGY CONVERSATION

These are complicated times for the country's oil and gas industry, and for the new head of the Canadian Association of Petroleum Producers. Lisa Baiton, who took over the helm of the organization that represents the country's largest petroleum producers in May, previously spent more than a decade working at the Canada Pension Plan Investment Board, as head of global public affairs.

ZERO-EMISSION VEHICLE REGISTRATIONS IN CANADA DROP TO 7.5 PER CENT IN SECOND QUARTER OF 2022

New zero-emission vehicle (ZEV) registrations in Canada in the second quarter of 2022 made up 7.5 per cent of the total new car market, according to data in the latest report from London-based consulting firm S&P Global Mobility. That figure represents a big step back from Q1 of this year, when ZEV registrations hit an all-time high of 8.3 per cent.

WESTERN REGION

ALBERTA OIL PRODUCTION SETS NEW RECORD IN FIRST HALF OF 2022

Alberta oil production set a new record in the first half of 2022, according to a report by ATB Economics. Daily production hit 3.6 million barrels a day between January and June — up from 3.5 million barrels in the first half of 2021. A decade ago, average production was roughly 2.3 million barrels a day, the report said.

TRANS MOUNTAIN NAMES DAWN FARRELL NEW CEO AND PRESIDENT

Dawn Farrell has been named the new president and chief executive of Trans Mountain Corp., and officially took over on Monday, August 15. She is tasked with overseeing the contentious Trans Mountain pipeline expansion, a project that has almost tripled its budget since the federal government acquired it in 2018.

ARBIOS BIOTECH, LHEIDLİ T'ENNEH FIRST NATION NAME NEW B.C. BIOFUELS FACILITY

Arbios Biotech and the Lheidli T'enneh First Nation announced the Arbios commercial scale facility in Prince George, B.C. is now known as Arbios Biotech Chuntoh Ghuna and means "The Forest Lives." The facility will convert 25,000 dry tonnes of woody biomass into 50,000 barrels of sustainable bio-oil per year, producing a direct substitute for fossil crude.

IFS AND MAJOR HEAVY-DUTY FLEETS COLLABORATE TO ADVANCE THE USE OF HYDROGEN FUEL IN HEAVY-DUTY TRUCKS

Innovative Fuel Systems Ltd. (IFS), an Edmonton-based cleantech company, is pleased to announce its collaboration with several major trucking fleets to support and advance hydrogen fuel use in existing HD engines using IFS' patent-pending retrofit dual-fuel technology, which represents the fastest and most economically efficient pathway to hydrogen fuel usage within the industry.

PRAIRIE REGION

PLAINS MIDSTREAM CANADA PURSUING FORT SASKATCHEWAN FACILITY EXPANSION

Plains Midstream Canada, a subsidiary of Plains All American, announced August 16 it is exploring the expansion of its Fort Saskatchewan facility with strategic partners. The expansion would leverage existing infrastructure and add 50,000 barrels per day of C3+ fractionation capacity.

ONTARIO / QUÉBEC REGION

BVD GROUP DONATES \$10 MILLION TO OSLER FOUNDATION

CEMA Member the BVD Group donated \$10 million to a cause close to the hearts of the community — The William Osler Health Systems. Operating three major hospitals in the Greater Toronto Area, William Osler Health Systems is uniquely positioned to make a massive impact on the community, something BVD Group CEO Bikram Dhillon aims to do with this generous donation.

ATLANTIC REGION

NOVA SCOTIA'S EVERWIND SIGNS GREEN AMMONIA DEAL WITH GERMANY'S UNIPER

EverWind Fuels, a private developer of sustainable hydrogen and ammonia production in Nova Scotia, says it has signed a memorandum of understanding for Germany-based Uniper to purchase green ammonia from the company's production facility in Point Tupper, N.S. The companies have an offtake agreement for 500,000 tonnes a year of green ammonia.

NORTHERN REGION

NUNAVUT GOVERNMENT MUM ON CAUSE OF FUEL SHORTAGE AT SOME HIGH ARCTIC AIRPORTS

Representatives from Nunavut's Department of Community and Government Services are offering no information about the cause of the fuel shortage impacting airports in four High Arctic communities. Canadian North announced the shortage on August 16. The company purchases its fuel from the territorial government's petroleum products division, which is under the purview of the Department of Community and Government Services.



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to your community.

On behalf of all our members, thank you.



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