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APRIL 2023

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JENNIFER STEWART

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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.

MESSAGE FROM THE PRESIDENT



JENNIFER STEWART | **PRESIDENT & CEO**

Dear Members,

It was such a pleasure to spend time with many of you at the 2023 Canadian Fuel Marketing Conference in Toronto last week. I enjoyed hearing from our fantastic lineup of speakers and having the chance to catch up with Members from across the country.

Events like this would not be possible without our sponsors. Thank you to National Energy Equipment Inc., Gilbarco Veeder-Root, Waleco, Dover Fueling Solutions, Bulloch Technologies, Valero Energy, Parkland Corporation, Canadian Tire Petroleum, Norcan, AIR-serv, and the Canadian Fuels Association for their support.

I hope to see you again on September 25 at the annual CEMA Golf Challenge being held at the stunning Glen Abbey Golf Club in Oakville, Ontario. Be sure to save the date! We'll have details for you soon.

In the meantime, remember we are always here to support you. Please don't hesitate to reach out with any questions or concerns you may have.

All the best,



Jennifer Stewart
President and CEO

Canadian Energy Marketers Association

STAYING CONNECTED

CEMA CONNECTION
2023 EVENTS, PODCASTS, WEBINARS

SEASON 3, EPISODE 4 ROAD CHATS NOW AVAILABLE

In this episode of Road Chats, we talk to Michelle Belisle of Imperial Oil Limited about the company's renewable energy project to reduce greenhouse gas emissions by about three million metric tons per year, the challenges in meeting government regulations on carbon intensity, and her confidence that Imperial will continue to provide secure and reliable energy for decades to come.

Listen [here](#).

CEMA GOLF CHALLENGE SAVE THE DATE

September 25, 2023

You won't want to miss this great event at the stunning Glen Abbey Golf Club in Oakville, Ontario. Save the date – details are coming soon!

CEMA ON SOCIAL MEDIA

Follow CEMA on [LinkedIn](#) and [Twitter](#) for the latest in energy policy, thought leadership, and content and event updates from membership and stakeholders.

CALL FOR NOMINATIONS

NOMINATIONS OPEN FOR TSSA SAFETY AWARDS 2023

Annual awards return to honour leaders in public safety

The Technical Standards and Safety Authority (TSSA) is now accepting nominations for its 2023 Safety Awards honouring Ontario leaders in public safety.

TSSA presents Safety Awards every year to individuals and organizations that have made significant contributions to Ontario's public safety in TSSA's regulated sectors: Fuels; Boilers and Pressure Vessels and Operating Engineers; and Elevating and Amusement Devices and Ski Lifts.

The 2023 Safety Awards recipients will be announced at TSSA's annual public meeting on September 21, 2023. Organizations or individuals can be nominated in two award categories

recognizing acts and initiatives that enhance public safety for Ontarians:

- **Impact Awards** highlight significant contributions to safety or a significant initiative or project that goes above and beyond regulatory compliance.
- **Legacy Awards** recognize the impact over time for persons or organizations that have demonstrated a history of safety conscientiousness.

Bonnie Rose, President and CEO of TSSA, says recognizing safety leadership is an important part of the public safety regulator's work to promote awareness of and encourage best practices.

"TSSA recognizes the positive impact individuals and organizations can have on their industry and the community," says Rose. "TSSA's annual Safety Awards is an important platform to highlight the important efforts of those who work tirelessly behind the scenes to make Ontario a safer place."

Nominations of individuals and organizations working in TSSA's regulated sectors will be accepted until June 2, 2023. Online nomination forms can be accessed at [TSSA's website](#).



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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

Cost of carbon emissions nearly five times higher than previously thought: analysis

The economic cost of greenhouse gas emissions is nearly five times higher than previously thought,

Environment Minister Steven Guilbeault said April 19. The minister told attendees at a climate change conference in Ottawa that the government used updated scientific knowledge and economic models to revise the way it evaluates how much climate change is costing Canadians. The new numbers have been in development for months but come after a recent report from the parliamentary budget officer on the economic costs of the carbon price. That report did not specifically equate the cost of the price on carbon to the costs of climate change itself.

Trudeau says federal government won't take back control of provincial natural resources

Prime Minister Justin Trudeau **will not move to take away provincial control** of natural resources. The issue of First Nations versus provincial control of natural resources came up at a town hall held at First Nations University in Regina on April 13. Trudeau said, "The conversation about getting the federal government to take back control [of] those resources is a non-starter. It's not going to happen. Federal government is not going to reopen the constitution to take back control of natural resources." The solution, he added, "is making sure

that every order of government... is serious and committed to using the tools and the powers they have to advance reconciliation.”

Canada short tens of thousands of oil and gas workers, government says

Despite industry transition plans that advocates fear will eventually phase out Canada’s oil and gas industry, government projections show **the sector is short tens of thousands of workers**. Those numbers were contained in a response to an order paper question submitted by Bow River MP Martin Shields, who asked Labour Minister Seamus O’Regan to elaborate on comments made earlier this year to senators saying Canada “needs more” oil and gas workers, not less.

Updates to lifecycle analysis models and technical guideline

The Ministry of the Environment, Conservation and Parks has posted a decision notice related to the Cleaner Transportation Fuels Regulation (O. Reg. 663/20) for public awareness on the Environmental Registry of Ontario (ERO). The decision notice, which can be accessed [here](#), encompasses decisions on:

- Proposed lifecycle analysis models to calculate the lifecycle greenhouse gas emissions intensity of new renewable fuel content.
- GHGenius model version 4.03c.
- An update to the Technical Guideline to add GHG calculation directions for the model for biodiesel from yellow grease in GHGenius 4.03.

Canadian CCUS policy requires further detail to support advancing projects

The Government of Canada’s 2023 budget contains additional measures to support the development of large-scale carbon capture, utilization, and storage (CCS/CCUS) projects, but Canada’s policy framework still requires key details to spur private-sector investment, **according to a new overview of CCUS policy** by the International CCS Knowledge Centre. The Knowledge Centre has delivered a primer that provides a detailed breakdown of the government’s proposed investment tax credit that is expected to be in place by October this year, following further public consultation. The primer can be downloaded [here](#).

PROVINCIAL & TERRITORIAL POLICY TRENDS

WESTERN REGION

CICE releases B.C.’s first carbon management blueprint

The B.C. Centre for Innovation and Clean Energy **has released the B.C. Carbon Management Blueprint**, a first-of-its-kind study to help shape British Columbia’s emerging carbon management sector. The study confirms that alongside carbon removal efforts, B.C. must scale up carbon emission avoidance strategies to meet 2050 net-zero targets and remain in line with a 1.5 C future. Produced in partnership with Deloitte Canada, the report provides an understanding of existing carbon management approaches, the value chain, and the market participants that drive the supply and demand of these solutions. Read the full report [here](#).

Alberta targets net zero by 2050, no interim targets

Alberta on April 19 released the **Alberta Emissions Reduction and Energy Development Plan**, which is aimed at reaching net-zero carbon emissions by 2050, but did not announce any interim targets in a move that puts it at odds with the federal government. Alberta Environment Minister Sonya Savage said the province is working on developing sector-specific emissions reduction targets but **did not want to impose interim goals that were unrealistic**.

PRAIRIE REGION

Onion Lake Cree Nation sues province over Saskatchewan First Act

Onion Lake Cree Nation is suing the Saskatchewan government over **autonomy legislation meant to reassert the province’s control over natural resources**. The First Nation, which straddles the Alberta-Saskatchewan boundary, filed its statement of claim in Court of King’s Bench in Saskatoon this week, saying the Saskatchewan First Act infringes on treaty rights. The First Nation is arguing the bill was enacted without input, consultation, or consideration of Indigenous people, calling it utterly repugnant to the letter and spirit of the treaty. The province has said the bill,

which passed in March, is to protect Saskatchewan's opportunity to grow without federal infringement.

ONTARIO/QUEBEC REGION

Doug Ford opens door to storing CO2 underground to help hit climate change targets

Premier Doug Ford's government is **opening the door to allowing underground carbon capture** in Ontario, a way of fighting climate change by trapping and storing greenhouse gas emissions. The government brought in legislation to repeal Ontario's previous ban on injecting carbon dioxide underground, and is now proposing rules for carbon capture pilot projects. Ontario's Minister of Natural Resources, Graydon Smith, calls carbon capture a big opportunity for the province.

ATLANTIC CANADA

Bear Head Energy receives environmental approval for large-scale green hydrogen and ammonia project in Nova Scotia

Bear Head Energy, Inc. **announced April 12** it has received environmental assessment approval from the Honourable Timothy Halman, Minister of Nova Scotia Environment and Climate Change, for the company's green hydrogen and ammonia production, storage, and loading facility in Point Tupper, Nova Scotia. Bear Head will be developed in phases and is expected to commence deliveries of green hydrogen and ammonia by 2028 at costs among the lowest in the world, driven by Nova Scotia's world-class wind resource, support from the Canadian federal government, and proximity to key markets.

NORTHERN REGION

NWT carbon tax bill passes by narrowest margin in 9-8 vote

A **bill that amends the Northwest Territories' carbon tax** to align with new federal requirements passed at the end of March by the narrowest of margins in a 9-8 vote. Kevin O'Reilly, a fierce critic of Bill 60 who would certainly have opposed it and cast a tying vote, was absent from the chamber as third reading of the bill took place. O'Reilly said by email he was away acting as a medical travel escort for his wife. The result means a new version of the carbon tax designed by the NWT government kicked in starting April 1, and the territory did not default to the federal backstop.

GLOBAL RESEARCH TRENDS

Exxon and Toyota test low-carbon fuels in gasoline engines

Exxon Mobil Corp. and Toyota Motor Corp. formed a partnership to test low-carbon fuels in gasoline engines, potentially offering a way for drivers to reduce emissions without upgrading to an electric vehicle. The fuel blends are made from cleaner feedstocks and could one day cut greenhouse gas emissions from internal combustion engines by as much as 75 per cent compared with regular gasoline, said Andrew Madden, Exxon's vice president for strategy and planning, citing initial trial results. The findings raise the prospect of **a drop-in solution that could compete with battery-powered cars in the future.**

Biodiesel market is projected to reach \$51.47 billion by 2029

According to a new **market research report by Meticulous Research**, the biodiesel market is projected to reach \$51.47 billion by 2029, at a CAGR of 3.6 per cent during the forecast period. The growth of this market **is driven by** an increase in biodiesel consumption, rising environmental concerns, and increasing demand for biodiesel to replace fuels in transportation and power generation. Moreover, government support from North America, Latin America, Europe, and Asia-Pacific countries is expected to offer significant growth opportunities for players operating in the biodiesel market.

French study boosts ethanol in road transport decarbonization debate

A French study found that hybrid vehicles running with up to 85 per cent renewable ethanol (E85) **are just as climate-friendly** as electric vehicles if the "full-life-cycle" argument is taken into account. According to the ethanol industry, the findings were key in addressing the deadlock in the EU debate on banning internal combustion engine cars from 2035. The study, conducted by IFPEN – a French public institute dealing with energy and environment – measured and compared the greenhouse gas emissions of vehicles powered solely by gasoline, plug-in flex-fuel hybrids running on E85, and all-electric cars, based on a full-life-cycle analysis.

road chats

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Get to know
leading companies
and influencers
from Canada's
energy and
convenience sector
in the monthly
podcast Road Chats.

SEASON 3, EPISODE 4

Michelle Belisle
Imperial Oil Limited

LISTEN NOW



ADVOCACY CORNER

Featured in the newsletter on a monthly basis, Advocacy Corner provides insight into federal and provincial political activity of importance to our Members. Read on to find out what decisions are being made, what's on the horizon, and what it all means for our sector.

Carbon Tax Increase

On April 1, the carbon price rose to \$65 per metric ton, or a 14 cent-per-litre levy. This was the first time the annual increase has clocked in at \$15 instead of \$10. In the past we've seen gimmicks like coordinated gas tank fill-ups or gas pump stickers, but this year ushered in a focused numbers war.

The Conservatives will say this is making life even more unaffordable and the Liberals will counter that 80 per cent of households are rebated more than they pay. But a new report from the Parliamentary Budget Officer (PBO) breathed new life into Conservative claims that the carbon tax increases the cost of everything by suggesting "most households will see a net loss" when the broader economic impacts are accounted for.

Environment Minister Steven Guilbeault partnered with the U.S. Environmental Protection Agency to respond with a report of his own, finding that the social cost of carbon emissions is nearly five times higher than was previously thought. The report analyzed whether the cost of cutting emissions is higher than the cost of climate change on factors such as food production, human health, or disaster repair bills. The report suggests those costs have risen from \$54 per tonne in 2020 to over \$260 per tonne in 2023.

Neither the PBO report nor Guilbeault's report will make the Liberals want to talk about what

the carbon tax has actually achieved, though. It's simply too difficult to measure and communicate. Guilbeault struggles, as the mouthpiece of the government on the carbon tax, to explain what's been achieved other than the administration of rebate payments to those who qualify for them. With the actual costs of the carbon tax – and even the social costs of carbon emissions – much easier to calculate and communicate, expect the numbers war to continue ramping up.

Audit Season

In his **2023 audit of GHG reductions through greenhouse gas regulations**, Commissioner of the Environment and Sustainable Development Jerry DeMarco concluded that the government doesn't know the impact of selected regulations on reducing emissions. This was because the department uses modelling approaches to estimate emission reductions but does not measure or report on the contributions of each regulation toward Canada's 2030 target.

This is troubling for both the government and the sector because it increases the uncertainty about the quantity and significance of the reductions being achieved. For the government, it may make it more difficult to sell Canadians on their actions. For the sector, it creates an impetus to keep the government focused on existing strategies and avoid increased complexity through new regulations and programs.

An Opening for Canadian Oil and Gas

Add this to the new data points helping the Conservatives on the natural resources file: Canadians increasingly support growth of the domestic oil and gas sector and view it as important to both Canada's current and future economy.

Key findings, **courtesy of Nanos Research and the University of Ottawa**, include:

- Seventy-four per cent of Canadians agree the sector is important to Canada's current economy (57 per cent say it's important to the future economy).
- Over 50 per cent of Canadians at least somewhat agree Canadian oil and gas exports should be expanded to help secure global energy supplies.

- About two-thirds of Canadians at least somewhat agree the Canadian sector can contribute to combatting global climate change.

The new data points, especially the growing trend of Canadians viewing the sector as important to our economic future, pose a threat to the Liberals given a disconnect with their climate agenda and the spending they've promised on green technologies, including tax credits and financing for clean electricity and hydrogen, clean tech manufacturing, and carbon capture technology.

The government will point out that Canadians are over two times more likely to outright support growth of the renewable energy sector (74 per cent) than they are growth of the oil and gas sector (35 per cent) in Canada. But to meet climate objectives, the government can't simply add renewables, it must also subtract carbon. Canadians (63 per cent) are increasingly lining up behind the dual opportunity to create economic advantage for Canada while removing global emissions by displacing dirtier forms of transportation fuel.

We'll see if Pierre Poilievre can take advantage of these changing sentiments to develop a climate plan that is at least somewhat credible with the centrist voters he desperately needs to form government.



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

[G7 PUTS FOCUS ON PUSH FOR GLOBAL FOSSIL FUEL PHASEOUT DEAL](#)

In a joint statement at their meeting in Sapporo, Japan, on April 18, G7 climate ministers agreed “to accelerate the phase-out of unabated fossil fuels so as to achieve net zero in energy systems by 2050 at the latest.”

[STELLANTIS TESTS E-FUELS ON EXISTING ENGINES TO DECARBONIZE FLEET](#)

Carmaker Stellantis is testing synthetic e-fuels, which are made with renewable energy, on 28 types of its internal combustion engines, a step it said on April 20 could help decarbonize its existing European fleet. Solutions tested could apply to up to 28 million Stellantis vehicles.

[CHINA SET TO SLASH FUEL EXPORT QUOTAS](#)

Chinese authorities are expected to give much lower fuel export allowances to refiners in the second batch of quotas in the coming weeks amid rising domestic demand, a Reuters survey of state refiners and consultancies showed on April 20.

[G7 COALITION TO KEEP RUSSIAN OIL PRICE CAP AT \\$60 PER BARREL](#)

The Group of Seven (G7) coalition will keep a \$60 per barrel price cap on seaborne Russian oil, a coalition official said, despite rising global crude prices and calls by some countries for a lower price cap to restrict Moscow’s revenues.

THE GROWING CASE FOR SYNTHETIC FUEL

Columnist David Booth describes why the case for synthetic fuel is growing, how governments in other countries are responding, and what this means for Canada, now and in the future.

AUSTRALIA INTRODUCES VEHICLE POLLUTION RULES TO BOOST EV UPTAKE

Australia said on April 19 it would introduce new standards targeting vehicle emissions to boost the uptake of electric cars, as it looks to catch up with other developed economies. Just 3.8 per cent of cars sold in Australia last year were electric, well behind other developed economies.

UNITED STATES

BIDEN ADMINISTRATION SEES YEAR-ROUND SALES OF HIGHER ETHANOL FUEL BY 2024

A U.S. plan for year-round sales of a fuel blend with more ethanol known as E15 in eight Midwestern states will likely go into effect in summer 2024, a year later than the states sought, the top U.S. environment regulator told lawmakers on April 19.

CHEVRON ROAD TRIP DEMONSTRATES RENEWABLE GASOLINE BLEND

Representatives of Chevron U.S.A. Inc. and Toyota are taking a road trip across the U.S. Gulf Coast to showcase an innovative new gasoline blend with more than 50 per cent renewable content. The fuel is more than 40 per cent less carbon intensive than traditional gasoline on a lifecycle basis.

BIDEN'S ELECTRIC CAR TARGET HAS A PROBLEM: MANY AMERICANS DON'T WANT THEM

Some 41 per cent of U.S. adults would not buy an electric car, according to an April 12 Gallup poll of a random sample of 1,009 people. This, if extrapolated to the wider population, would represent around 106 million Americans who are against a key plank of Joe Biden's vision of a green economy.

MAJOR FUNDING ROUND FOR HYDROGEN VEHICLE REFUELING INFRASTRUCTURE OPENING IN CALIFORNIA

The second round of the California Energy Commission's Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles hydrogen funding lane will open for two weeks on April 27, covering 50 per cent of eligible equipment and software costs for standard projects, up to \$3 million per project.

CANADA

NEW TECHNOLOGY COULD BRING HYDROGEN INTO THE MAINSTREAM

The proprietary exothermic reactions of Canadian energy producer GH Power create green outputs such as hydrogen and alumina, with a significantly lower carbon footprint and cost than existing processes. The company is preparing for commercial operations in Hamilton, Ontario.

OPINION: IF WE WANT TO REDUCE EMISSIONS, ARE ZEV MANDATES REALLY THE BEST WAY?

Mark Richardson argues that changing our focus from increasing EV sales to reducing greenhouse gas emissions would be more cost-effective, require fewer rare minerals, and reduce the number of people hanging on to older cars.

WESTERN REGION

STEEPER ENERGY, INVEST ALBERTA TO BRING BIOCRUDE PLANT TO ALBERTA

Steeper Energy announced the signing of a memorandum of understanding with Invest Alberta Corporation to commercialize Steeper's proprietary Hydrofaction technology, which can convert a wide range of biowaste feedstocks to flexible renewable biocrude.

CAN YOU FUTURE-PROOF A REFINERY AGAINST CLIMATE CHANGE CONCERNS? SHELL THINKS SO

Shell has selected five of its refineries (including one in Scotford, Alberta, northeast of Edmonton) to transform into low-carbon energy facilities the company plans to operate for decades to come.

TOURMALINE HITS THE PAVEMENT WITH COMPRESSED NATURAL GAS FUELING STATIONS

Tourmaline Oil, along with California-based partner Clean Energy Fuels, is spending \$70 million to build and operate a network of up to 20 compressed natural gas (CNG) fueling stations across western Canada over the next five years for CNG-equipped heavy-duty and commercial trucks.

SHERRITT PRESSES FORWARD WITH HYDROGEN DEMONSTRATION PLANT IN FORT SASKATCHEWAN

Aurora Hydrogen has received approval to build a demonstration plant at the Sherritt Technologies facility in Fort Saskatchewan, Alberta. The company's technology essentially retrofits current natural gas facilities and equipment with hydrogen production capability.

HEAD OF ALBERTA'S ENERGY REGULATOR APOLOGIZES FOR HANDLING OF IMPERIAL OIL'S KEARL TAILINGS LEAK

The president of Alberta's energy regulator apologized April 24 for how the agency handled an oilsands tailings pond leak at an Imperial Oil mine that wasn't publicly disclosed for nine months.

PRAIRIE REGION

LOUIS DREYFUS TO EXPAND CANADIAN CANOLA PLANT, LATEST TO CRUSH MORE OILSEEDS

Global crop trader Louis Dreyfus Corp has announced it will more than double the size of its Canadian canola crushing plant in Yorkton, Saskatchewan to more than two million metric tons by 2023 as part of the global drive to boost renewable fuel production.

MINNOVA RENEWABLE ENERGY AND CITY OF FLIN FLON AIM TO DEVELOP LARGE-SCALE GREEN HYDROGEN PRODUCTION

Minnova Renewable Energy and the City of Flin Flon will work cooperatively to evaluate potential for the City of Flin Flon and surrounding communities to become a northern trading hub for green hydrogen and hydrogen-based energy carriers.

ONTARIO / QUÉBEC REGION

VW CEO SAYS EV BATTERY PLANT PLANNED FOR ONTARIO COULD BECOME ONE OF THE WORLD'S LARGEST

A massive new electric vehicle battery plant in St. Thomas, Ontario, is being hailed as a "game changer" for Canada's auto sector and the broader economy. Details of the multi-billion-dollar project were announced on April 21 at an official welcome for German automaker Volkswagen.



THANK YOU TO ALL OUR FRONTLINE WORKERS!

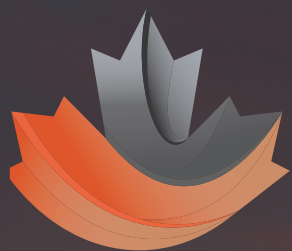
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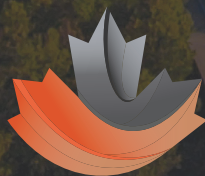
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We want to share the successes of our Members.
If you want to feature your company's recent
achievements, updates, or simply want to be
featured, please reach out to Jennifer Stewart at
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