

INDUSTRY NEWS UPDATES | MEMBER BENEFITS | UPCOMING EVENTS | AND MORE

JAN 2026

# connection

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**PRESIDENT'S MESSAGE**

**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.

# MESSAGE FROM THE PRESIDENT

JAKE ENWRIGHT | **PRESIDENT & CEO**

CEMA Members,

I hope you all had a restful and enjoyable holiday, with lots of time spent with family and friends.

With the annual conference fast approaching, I am pleased to announce that award-winning columnist Chantal Hébert will once again be joining us to provide her political insights and views on the rise of separationism in Quebec. Chantal will be joining former industry James Moore and journalist Ben Mulroney as our headline guests. Over the next week, I hope to announce two additional special guests who will be joining this year's conference. Stay tuned.

As a reminder, if you have not purchased your ticket yet, please do so as soon as possible.

CEMA has been active this past month advocating for cohesive government policies that make it easier to do business nationwide. Alongside our industry partners, we have worked tirelessly to resolve the New Brunswick carbon adjustor issue and continue to pressure the federal government to implement a mechanism that would allow our members to receive refunds for carbon taxes incorrectly paid by distributors and retailers. I expect to have an update for you on this issue in the coming weeks.

As always, thank you for your continued support of our association and industry. If there is anything CEMA can do to support you or your business, please do not hesitate to contact me.

Kind regards,

*Jake Enwright*

Jake Enwright  
**President & CEO**  
**Canadian Energy Marketers Association**

# STAYING CONNECTED

## CEMA CONNECTION 2026 EVENTS, PODCASTS, WEBINARS



### REGISTER NOW: 2026 CANADIAN ENERGY MARKETING CONFERENCE

We're looking forward to seeing you in Montreal at the 2026 Canadian Energy Marketing Conference from April 20 to 22. Hear from notable speakers like the Honourable James Moore, formerly Canada's Minister of Industry, and Ben Mulroney, one of Canada's most recognized media voices! More speaker announcements coming soon. [Purchase your ticket here.](#)

### SAVE THE DATE: CEMA ADVOCACY TOWN HALL

Mark your calendar for the first Advocacy Town Hall of the year on March 15, 2026. Stay tuned for more details.

### CEMA ON SOCIAL MEDIA

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



# 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

### **'Incredible alignment': Canada is picking away at an oil and gas industry wish list**

Again and again last year, Canadian oil and gas executives and lobby groups made public overtures to Prime Minister Mark Carney to "unwind the past decade" of environmental and energy policy in order to **"unlock" fossil fuel industry growth**. After eight months in office, the Carney government has

signalled major policy changes through its Building Canada Act, its Major Projects Office, its federal budget and its pipeline-focused memorandum of understanding with Alberta. All of this brings federal policy at least partially in line with the list of proposals made by these industry representatives.

### **New federal auto task force will include Ontario, industry minister says**

The federal government will set up a **new auto task force to protect jobs**, and it will include the Ontario government, Industry Minister Mélanie Joly announced in Toronto on January 26. The task force will look at issues such as the future of car manufacturing, investment, jobs, and electrification, Joly said, and will enable the federal government to coordinate efforts with the Ontario government when Ottawa presents a new auto strategy. "There are many things we can't control, but there are things we can control," Joly said, adding the latter included "what we do with our manufacturing sector here in Ontario and across the country."

## **WESTERN REGION**

### **Alberta greenlights \$900M borrowing authority for provincial oil and gas agency**

Alberta has authorized the province's commercial oil and gas agency to borrow nearly \$1 billion for market investments, a move which **could attract a private proponent** to invest in a pipeline to the B.C. coast, according to one expert. The authorization acts as a line of credit that allows the Alberta Petroleum Marketing Commission (APMC) to borrow up to \$900 million for what the province calls "hydrocarbon marketing activities." Richard Masson, an executive fellow at the University of Calgary's School of Public Policy, observed, "That all looks very much like it's setting APMC up to be the proponent for a northwest coast pipeline."

### **B.C. Energy Minister Dix says North Coast Transition Line will boost LNG project**

British Columbia's Energy Minister Adrian Dix says an agreement between BC Hydro and the Nisga'a First Nation will help power a **planned floating LNG terminal** in northwestern B.C. across the finish line. Dix said the agreement, marked by the signing of a memorandum of understanding in Prince George, B.C., on January 20, will see the North Coast Transmission Line supply up to 600 megawatts to what proponents say will be Canada's second-largest LNG facility. Construction of the line, which received environmental approvals from the provincial and federal governments in September, is expected to start this summer.

## **PRAIRIE REGION**

### **Saskatchewan to push for pipelines amid fears Venezuelan oil could affect prices**

Concerns are being raised about the potential impact on Saskatchewan's oil sector if U.S. President Donald Trump is able to ramp up oil production in Venezuela. Saskatchewan Trade and Export Minister Warren Kaeding said his main concern is **the price of oil that Saskatchewan ships into the U.S.** in the future. However, he said, concerns can also spark change. Kaeding said Saskatchewan shipped around \$12.5 billion worth of crude oil into the U.S. in 2024 and that the province is focused on expanding its markets, providing better opportunities to the energy sector, and finding cost-effective ways to get oil to market.

## **ONTARIO AND QUEBEC**

### **If elected, the Parti Québécois would not necessarily oppose new gas or oil pipelines**

A future Parti Québécois government **would not rule out oil or gas pipeline projects** in Quebec. Party members voted down a resolution at a PQ convention in Saint-Hyacinthe on January 25 that would have barred such developments. Opponents of the motion argued it could prevent industrial facilities from accessing natural gas needed for operations and economic development. The proposal was defeated by a strong majority of delegates. Last year, a proposed gas pipeline linking Western Canada to Baie-Comeau, Quebec, was discussed as part of a liquefied natural gas export terminal project.

## **ATLANTIC REGION**

### **Atlantic hydrogen firms welcome €200M in German investment for Canadian exports**

The budding hydrogen sector in Atlantic Canada is welcoming a €200-million commitment (about \$323 million Cdn) from the European Union to support the **production of renewable hydrogen and its derivatives** in Canada. The EU's executive branch approved the money last week, saying it will unlock matching funds from the Canadian government for fuels that would be exported to Germany. This is the EU's final regulatory step to bring into operation Canada and Germany's joint declaration of intent to work together on clean hydrogen.



# 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.

## International Trade Heats Up

Amid international trade tensions with the United States, Prime Minister Mark Carney has made trade diversification his priority this month. During the first visit to China by a Canadian prime minister since 2017, Carney negotiated a targeted trade/tariff agreement aimed at easing specific barriers and resetting bilateral commercial relations. The two governments agreed to deepen cooperation on clean and conventional energy after years of tense relations. They signed a Memorandum of Understanding, building on the foundation of a previous agreement, that commits China and Canada to discussing oil and gas resource development, including LNG, liquified petroleum gas, and emission-reduction technologies.

The trade mission to China also led to a sharp reduction in the tariffs on Canadian canola in exchange for concessions on Chinese electric vehicle tariffs. This decision was applauded from an agricultural perspective by Saskatchewan Premier Scott Moe but faced heavy criticism from Ontario Premier Doug Ford, who saw it as severely damaging the domestic electric vehicle industry. However, after a 45-minute meeting in Etobicoke with the prime minister and industry minister Melanie Joly January 26, Ford appeared to have a change of heart. Joly said the federal government is creating an "auto task force" to coordinate between Ottawa and Ontario, saying Canada does not want to see any erosion of its manufacturing sector. Ford called this new federal auto strategy "great."

China was not the only country with which Canada explored increased trade this month: there was also discussion with Saudi Arabia about energy partnerships. Representatives travelled to the Future Minerals Forum in Riyadh, Saudi Arabia following Canada's signing of a Memorandum of Understanding with Saudi Arabia's Minister of Industry and Mineral Resources, Bandar Ibrahim Al-Khorayef. The aim of the MOU was to enhance cooperation in the field of mineral resources and forge a deeper energy understanding between the two nations, furthering Canada's aim to diversify its trade away from reliance on the United States.

In addition, Energy Minister Tim Hodgson attended India Energy Week from January 27 to 30 in Goa, promoting Canadian energy resources and technologies. The prime minister is scheduled for his own visit to India in March.

And finally, during a South Korean government delegation visit to Ottawa this week, Ottawa and Seoul signed a Memorandum of Understanding that pledges both sides to working together to promote the manufacturing of autos, electric vehicles, batteries and hydrogen-powered vehicles.

## Provincial Partnerships

While the federal government travels globally to forge energy partnerships with nations, provincial leaders have been doing the same. Alberta Members of Legislative Assembly (MLAs) headed to the National Conference of State Legislatures (NCSL) meeting in San Diego from January 15 to 17 to promote Alberta's energy. The aim of the trip was to promote Alberta's profile as the top choice for secure and reliable partnerships in energy and emissions-reduction technologies.

Despite their continued push for trade collaboration with the U.S., and the rise of Alberta separatist sentiment, Alberta Premier Danielle Smith has clarified the province's position, saying that Albertans want a "new deal with Canada" and pushing back against recent comments from U.S. Treasury Secretary Scott Bessent, who called Alberta a "natural partner" for statehood.

While his Alberta counterparts focused on U.S. leaders, British Columbia's David Eby pursued new partners in India, packing in as many meetings as

possible during a six-day trip to the country. Eby said Indian firms are closely watching the progress of B.C.'s liquefied natural gas projects, although most of the enthusiasm was around buying raw metals and minerals that are produced in British Columbia to help transition to clean energy.

## Pipeline Pushback

Carney engaged in his first meeting with B.C. Coastal First Nations in Prince Rupert this month. The parties said the meeting was productive, but by the end, the key stakeholder group still opposed the pipeline. Marilyn Slett, president of Coastal First Nations and elected Chief of Heiltsuk Nation, reiterated the anti-pipeline sentiment in a press conference, saying, "Coastal First Nations, along with Lax Kw'alaams and the Haisla Nation, oppose any project that proposes to bring oil tankers to the north coast."

Then, on January 28, Carney had a meeting with Eby and Smith that the former called "very civil... and borderline friendly." Although Smith said afterward that she and Eby share "common ground" on a Trans Mountain pipeline expansion, Eby said B.C.'s position hasn't changed. He reiterated his concerns about the need for Indigenous consultation and said there would need to be investments in spill response should the project proceed.

Domestic and international tensions are ramping up alongside unprecedented partnerships and alliances, making for a difficult-to-predict energy landscape both at home and abroad.



# 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.

## INTERNATIONAL

### OPEC+ LIKELY TO MAINTAIN OIL PRODUCTION PAUSE FOR MARCH AS PRICES CLIMB

OPEC+ is expected to keep its pause on oil output increases for March at a meeting on February 1, with prices rising due to a drop in Kazakhstan's oil production. The meeting follows an 8 per cent jump in oil prices so far this month to exceed \$66 a barrel despite earlier concern that a supply glut would push prices down.

### GLOBAL OIL DEMAND GROWTH TO RISE IN 2026, IEA SAYS

The International Energy Agency revised its 2026 global oil demand growth forecasts upward on January 21 in its latest monthly oil market report, suggesting a slightly narrower market surplus this year. The IEA now expects global oil demand to rise by 930,000 barrels per day (bpd) this year, up from the 860,000 bpd growth forecast in its previous report.

## GLOBAL LNG SUPPLY SET TO JUMP IN 2026, LIMITING PRICES AND SPURRING DEMAND

Global liquefied natural gas (LNG) output is set to jump this year, easing constraints seen since the 2022 Ukraine war and dampening prices, which could spur demand including from top importers China and India, analysts say. This year marks the start of a large wave of supply that analysts expect to last until 2029.

## SOME LONDON PETROL STATIONS TO STOP SELLING DIESEL FUEL BY 2030

Some filling stations in London will stop selling diesel within the next four years as demand dwindles, according to a new report. The analysis by electric vehicle think tank New AutoMotive also predicted that many of the roughly 8,400 filling stations across the UK will have stopped selling the fuel by 2035.

### U.S.

## U.S. TO EXPAND VENEZUELA OIL ACCESS FOR TRADERS, REFINERS

The U.S. government plans to allow more trading companies beyond Vitol Group and Trafigura Group to purchase Venezuelan crude, a Trump administration official said. The pending authorization, expected to involve a general license easing existing sanctions, would require all Venezuelan oil supply deals to pass through the U.S. market.

## US SEEKS QUICK REPAIRS TO LIFT VENEZUELA OIL OUTPUT

The United States is in talks with Chevron, other crude producers, and major oilfield service providers about a plan to quickly raise Venezuela's crude production, Bloomberg News reported on January 24. With limited investment, Venezuela could boost production by several hundred thousand barrels over the short term, the report said.

## U.S. SEIZES SEVENTH SANCTIONED OIL TANKER TIED TO VENEZUELA

U.S. military forces seized a seventh tanker near Venezuela on January 20 as the Trump administration continues to pressure the South American country to halt its use of sanctioned ships and clamps down on the nation's oil trade. Motor Vessel Sagitta was captured in Caribbean waters without incident.

## HONDA TO BOOST OUTPUT OF CHEAPER, GAS-POWERED VEHICLES

Honda Motor Co. plans to increase production of cheaper gasoline-fueled vehicles this year, a reflection of lower U.S. emissions standards and a new-car affordability crisis. The Japanese carmaker's sales of electrified vehicles will take a back seat to gas-fueled cars and SUVs in response to growing demand for low-cost models.

## JEEP, CHRYSLER HALT PLUG-IN HYBRID MODELS FOR 2026

Jeep and Chrysler will stop making their plug-in hybrid models as Stellantis NV turns its focus to other hybrid powertrains, the automaker confirmed January 9. The phaseout means no more plug-in hybrids will be sold by Chrysler or Jeep for the new model year.

### CANADA

## WESTERN REGION

## CANADA'S PIPELINE PROBLEM RETURNS AS OIL SANDS OUTPUT SURGES

The Canadian oil industry's reprieve from pipeline bottlenecks may be nearing an end as global crude glut weighs on prices. For February, shippers on the Trans Mountain Pipeline Mainline were required to cut volumes by 22 per cent for dense oil and by 24 per cent for light crude – the most rationing since March 2024.

## PRAIRIE REGION

### MAX POWER CONFIRMS NATURAL HYDROGEN PRODUCTION AT SASKATCHEWAN'S LAWSON WELL

It's official: MAX Power Mining Corp., the Saskatoon outfit tackling natural hydrogen, has struck paydirt at its Lawson well in southern Saskatchewan. Samples sent to three independent labs showed high concentrations of hydrogen, and they even watched gas flow freely to the surface. In hydrogen exploration, scoring a high-purity discovery on the maiden run is huge.

### CLEAN FUEL POLICY POTENTIALLY COSTLY FOR RURAL MANITOBANS

The Canadian Taxpayers Federation warns federal fuel regulations could impact Manitoba residents disproportionately. For rural Manitobans, who often travel long distances for work, health care and basic services, fuel price increases can hit harder than in urban centres. Farmers, in particular, rely heavily on diesel, with limited alternatives available for large-scale equipment.

## ATLANTIC REGION

### BAY DU NORD OFFSHORE OIL PROJECT IN N.L. STILL UNCLEAR AS EQUINOR DELAYS DEADLINE

Equinor has delayed a key progress target as it decides whether to proceed with its proposed Bay du Nord offshore oil project in Newfoundland and Labrador. The Norwegian energy company said January 20 that a status deadline initially set for December has been adjusted as it hammers out a benefits agreement with the provincial government.

## ONTARIO AND QUEBEC

### TOYOTA STARTS BUILDING ALL-HYBRID 2026 RAV4 AT CANADIAN PLANTS, BRUSHING OFF TRADE WAR

Toyota has begun ramping up production of the 2026 RAV4 in Woodstock, Ontario, dismissing tariff risks tied to Canadian production, as its top-selling North American model goes exclusively hybrid for its sixth generation. The automaker will also build the model at one of its two nearby plants in Cambridge.



A close-up of a fuel gauge with the needle at 'E' (empty) is positioned in the top left corner. The background features a large truck with its headlights on, driving away into a bright orange sunset.

**Thanks to our  
Members for working  
so hard to fuel Canada.**

A blurred image of a gas station at night, with a car in the background and a fuel pump in the foreground.

**Canada's Energy Marketers:  
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**CEMA**  
CANADIAN ENERGY MARKETERS ASSOCIATION

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 Jake Enwright at  
**[jenwright@cemassociation.ca](mailto:jenwright@cemassociation.ca)**



**Jake Enwright, President and CEO**

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