

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

SEPTEMBER 2026

connection

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PRESIDENT'S MESSAGE

**GOVERNMENT POLICY
AND INDUSTRY UPDATES**

ADVOCACY CORNER

SECTOR NEWS UPDATES



FULL MEMBERS



ASSOCIATE MEMBERS



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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

PETER KILTY | **PRESIDENT AND CEO**

Dear Members,

Welcome back from the summer months. I hope everyone had an opportunity to enjoy some well-deserved time with family and friends.

It's a pleasure to bring back our monthly Connection magazine, where we'll continue to share timely information and keep Members up to date on the issues and events affecting our industry.

Earlier this month, CEMA also introduced a daily Government and Media Update, providing a convenient scan of key media and policy developments, along with links to the complete articles and reports for those who would like to learn more. It's an easy way to stay informed about the news and developments most relevant to our industry.

Last week we held our annual CEMA Golf Challenge at Glen Abbey, which has hosted the PGA Tour's Canadian Open multiple times. We had a great turnout, and for the first time in three years, we enjoyed a rain-free tournament! Planning is already underway for next year, and we'll share the details once they are confirmed.

Looking ahead, our AGM and Eastern Members' Dinner is coming up on October 8 at the Muir Hotel in Halifax, Nova Scotia. If you're based on the East Coast or your travels take you there at this time, please reach out. We'd love to have you join us.

Have a great month, and I look forward to connecting with many of you in Halifax.

Peter Kilty
President and CEO
Canadian Energy Marketers Association

STAYING CONNECTED

CEMA CONNECTION 2026 EVENTS, PODCASTS, WEBINARS



ANNUAL GENERAL MEETING AND DINNER: JOIN US IN HALIFAX!

Members are invited to join the CEMA Board of Directors for our Annual General Meeting, followed by dinner on **Thursday, October 8, 2026**, beginning at 4 p.m. at the Muir Halifax (1709 Lower Water St., Halifax, NS).

If you plan to attend, please email events@cemassociation.ca before EOD September 30.



SAVE THE DATE: ANNUAL SPRING CONFERENCE

The 2027 Canadian Energy Marketing Conference returns to Toronto **April 26–27, 2027!** Details and a full speaker lineup will be announced soon.



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

Poilievre urges tax cuts to make diesel fuel more affordable

Conservative Leader Pierre Poilievre is pitching a plan to **cut federal taxes on diesel fuel** and help ensure Canada has affordable supplies of the fuel in the future. Poilievre says Canada already produces enough diesel to meet national demand,

but transportation bottlenecks leave some regions dependent on U.S. imports. He proposes eliminating all federal tax on diesel sales until at least Canada Day by extending the full fuel excise tax cut until July 1 of next year and removing the GST from the purchase of fuel.

France's Macron hails new chapter in Canada ties, eyes LNG deals

French President Emmanuel Macron has opened the door to potential **liquefied natural gas deals** with Canada as France and other European countries seek more secure and diversified energy supplies. Macron met Prime Minister Mark Carney on September 20 in Saint-Pierre and Miquelon, the French territory located off Canada's Atlantic coast. The leaders pledged to strengthen cooperation in energy, trade, defence, space and strategic technologies. Macron said the discussions could lead to concrete bilateral agreements, including increased shipments of Canadian LNG to Europe.

WESTERN REGION

Alberta to pause provincial gasoline tax as of Oct. 1

Alberta Premier Danielle Smith says her government is axing its fuel tax for three months to help combat the cost at the pumps. Smith says starting October 1, **drivers will save 13 cents a litre on gasoline and diesel**. Fuel sellers and retailers who hold unsold inventory of an applicable fuel that was purchased before October 1, 2026, with Alberta fuel tax included may apply to TRA for a refund of \$0.13 per litre of clear fuel or \$0.04 per litre of marked fuel held in inventory at the close of business on September 30, 2026.

Inventory declarations and refund claims in respect of the current fuel tax relief must be filed electronically through the **Tax and Revenue Administration Client Self-Service (TRACS) secure online portal** using the 'File Inventory Declaration' feature. For information on how to access TRACS, refer to the TRACS page of the Government of Alberta website. TRA must receive the refund claim no later than September 30, 2027.

For more information, visit the **Fuel tax – Fuel sellers** webpage.

Alberta plans new royalty incentives to spur oil production

The Government of Alberta plans to announce in November a new **preferential royalty framework** to encourage companies to invest in new oil and gas production, the province's premier, Danielle Smith, said at the Oil Sands Expo in Fort McMurray on September 17. She added that with the new royalty regime, she expected a surge of interest in filling the proposed West Coast Oil Pipeline, which is expected to be listed as a project of national interest by October 1 and receive all approvals and permits by September 2027.

Ottawa approves FortisBC's Tilbury LNG expansion

The federal government has **approved expansion of the Tilbury LNG facility** in Delta, B.C., saying potential adverse effects are justified by the project's benefits. The September 21 approval under the "one project, one review" principle came immediately

after the B.C. government issued an environmental assessment certificate to FortisBC for the project on Tilbury Island in the Fraser River. The province says the project could generate 6,200 full-time-equivalent years of employment during construction and 100 permanent jobs, and contribute up to \$1.7 billion to provincial GDP during construction.

Independent Alberta would still have oil and gas, but how would separation affect market access?

Would Alberta face **new or different market access constraints** as a separate country? Market access could become one of several key issues in the broader debate about the economic ramifications of Alberta separation on the energy sector, according to **a report by the University of Calgary's School of Public Policy** released in mid-September. The study, commissioned by the provincial government, was unveiled ahead of the provincial referendum on October 19, which will see Albertans vote on whether to pursue a binding separation vote in the future.

PRAIRIE REGION

Latest gas price hikes prompt more NDP calls for Saskatchewan to suspend fuel tax

The latest hikes in the price of gas in Saskatchewan have prompted renewed calls from opposition New Democrats to **suspend the provincial 15-cent-a-litre fuel tax**. The NDP issued a news release September 21 pointing to the high price of fuel in various communities, according to GasBuddy.com. "The bottom line is the Sask. Party is raking in additional revenue from surging oil prices while everyday people relying on their vehicles for work, to pick up their kids, and so much more are getting squeezed more than they can bear," said Finance critic Trent Wotherspoon in a statement.

Port of Churchill, railway improvements would cost fraction of LNG project proposed by Manitoba premier

As Premier Wab Kinew pitched investors on a Port of Churchill expansion that could cost as much as \$80 billion, the company that owns the northern Manitoba port said it only needs a small fraction of that cash — less than \$3 billion — to **improve the port and the railway** that connects it to the rest of

Canada. The premier's proposed expansion would include a floating, offshore liquefied natural gas platform. Arctic Gateway Group, which owns the port as well as the Hudson Bay Railway, says the money required to conduct more basic work to make Churchill a viable commercial port is an order of magnitude lower.

ONTARIO AND QUEBEC

Christine Fréchette claims more Quebecers are warming up to fracking

Shale gas became an issue on the campaign trail Saturday as Coalition Avenir Québec leader Christine Fréchette claimed more **Quebecers are warming up to fracking** amid trade tensions with the United States. Fracking has been raised during the Quebec election campaign, especially with the Quebec Conservatives pushing fossil fuels to boost the economy. Fréchette was reacting to a report by La Presse that, citing its own survey, showed Quebecers are still heavily divided on the issue. However, the newspaper said the survey showed support for fracking increased if used as a tool to gain autonomy from American markets.

ATLANTIC REGION

P.E.I. suspends provincial fuel tax to ease cost of living

P.E.I. Premier Rob Lantz announced September 25 that the **provincial fuel tax would be suspended** until January 31, 2027, removing 8.47 cents per litre from the price of gasoline and 14.15 cents per litre from the price of diesel. The tax will return at 50 per cent of its current rate from February 1, 2027 until March 31, 2027, and be fully restored on April 1, 2027. To receive a refund on tax-paid inventory on hand at the close of business on Friday, September 25, 2026, retailers must submit the province's gas tax refund form and supporting documentation by Saturday, October 31, 2026. The form can be found [here](#).

P.E.I. to explore ethanol blending facility as relief measure for high gas prices

The use of **ethanol-blended fuels** in P.E.I.'s neighbouring provinces helps explain why pump prices are sometimes lower on the mainland. That's one of the messages shared by representatives from

P.E.I.'s standing committee on natural resources and environmental sustainability, which is exploring how the province's gasoline price regulator sets prices in the province. While the war in Iran accounts for much of the price hikes consumers have been seeing, P.E.I. consumers have also noticed price differences compared to neighbouring jurisdictions.

Opinion: Canada's best Atlantic LNG opportunity is already built

Canada's **most practical Atlantic LNG opportunity** was not among the projects showcased at the Canada Investment Summit in mid-September. A Repsol-owned LNG receiving and regasification terminal in Saint John, New Brunswick represents valuable infrastructure operating far below its potential. Canada should examine converting it into a bidirectional terminal capable of exporting North American gas to Europe. Repsol studied and rejected such a conversion in 2023 because of the high cost of moving Western Canadian gas across the continent. But now there's a new answer to the problem that defeated every earlier East Coast proposal: feedgas.



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.

Parliament is Back

The House of Commons is back in session, and the federal government has hit the ground running. Prime Minister Mark Carney stated that this fall would be a “crucial session” for Canadian decision-makers. Following recent by-election wins that strengthened the Liberals’ position in the House, the government began the session by tabling Bill C-38, the Canadian Fuel Affordability Act, to implement the previously announced extension of the federal fuel excise tax relief.

Making Alliances Across the Globe

The federal government has continued pursuing trade diversification, including discussions about a deeper partnership with the European Union following a proposal for Canada to become the EU’s first associate member. Energy security is emerging as a key area of potential cooperation as European countries look to diversify their energy supplies amid continued geopolitical instability. This could create new opportunities for Canadian energy exports, although infrastructure investment would likely be required to fully capitalize on them.

Canada has also turned its sights to Asia. Last week, International Trade Minister Maninder Sidhu announced that negotiations on separate free trade agreements with the Philippines and the Association of Southeast Asian Nations (ASEAN) are more than 90 per cent complete. Canada’s growing LNG export capacity is an important part of its trade proposition in a region seeking greater energy security and diversification.

Canada also hosted Germany's Foreign Minister last week, with energy security among the areas of ongoing cooperation between the two countries.

Alberta Pauses Its Provincial Fuel Tax

Amid growing international tensions that have driven energy prices to unprecedented levels, the Alberta government recently announced that it will pause its provincial fuel tax beginning October 1, 2026. Under the Fuel Tax Relief Program, the province will suspend the collection of tax on gasoline, diesel, and related products until at least December 31, 2026.

Effective October 1, 2026, all fuel sellers must stop charging and collecting the provincial fuel tax on all applicable fuels sold. The relief does not apply to aviation gasoline and jet fuel, liquefied petroleum gas, or locomotive fuel. The Alberta government is also providing a proactive refund mechanism for retailers holding eligible fuel inventory on which the provincial tax has already been paid. Inventory declarations and refund claims must be filed electronically on the TRACS page of the Government of Alberta website by September 30, 2027.

The Alberta government has also been advancing its energy priorities both domestically and abroad. Energy and Minerals Minister Brian Jean travelled to London to advance carbon capture capabilities and international energy partnerships, while Minister of Environment and Protected Areas Grant Hunter headed to New York to promote Alberta's approach to responsible energy development and emissions reduction.

Provincial Shake-ups

British Columbia Premier David Eby has called a snap provincial election following a period of turmoil for the Opposition Conservative Party and the resignation of its leader. The move has drawn criticism from opponents, who have accused the government of political opportunism, as the election comes less than two years into the provincial government's mandate. Eby cited the threat posed by United States President Donald Trump and ongoing trade tensions as key reasons for seeking a new mandate.

The election call comes as B.C. continues to expand its energy sector. The province recently issued an

environmental assessment certificate to FortisBC for the expansion of its existing LNG facility on Tilbury Island in the lower Fraser River in Delta. FortisBC's Phase 2 expansion of the Tilbury facility is slated to generate billions in economic benefits for the Canadian economy.

On the East Coast, Prince Edward Island announced its own provincial fuel tax pause as of September 25. Like their peers in Alberta, PEI retailers can be refunded for tax paid on fuel inventory they had on hand when the pause went into effect. However, they will need to move quickly, as their documentation is due by October 31, 2026.

The province is also bringing forward legislation for debate during the fall sitting that would dismantle the Island Regulatory and Appeals Commission (IRAC) and establish the PEI Energy and Utilities Board and the PEI Land and Appeals Board as independent, specialized decision-making bodies. Given the PEI Energy and Utilities Board's role in energy pricing and regulation, the proposed restructuring will be an important development for the energy industry to monitor.



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

[MACRON CALLS G7 MEETING TO CONSIDER NEW STRATEGIC OIL STOCK RELEASE](#)

French President Emmanuel Macron said on September 18 he would convene a meeting of the Group of Seven countries in the coming weeks to discuss a potential release from strategic oil-product stockpiles as soaring energy prices sap economic growth. He also wants the group to increase “cooperation on exports and production capacity.”

[DRONE STRIKES CRIPPLE HALF OF RUSSIA'S TOP DIESEL REFINERIES](#)

Three of Russia's six largest diesel-producing refineries are now either shut or operating at roughly one-quarter capacity after Ukrainian drone attacks damaged plants that together form the backbone of the country's fuel system. The six refineries—Omsk, Kirishi, Taneco, Volgograd, NORIS, and Perm—account for roughly half of Russia's diesel production.

[GERMANY PLEDGES TO PHASE OUT FOSSIL FUELS FOR FIRST TIME WITH TARGET OF 2045](#)

Europe's biggest economy, Germany, has committed to phasing out fossil fuels by 2045, despite fierce debate about its green policies. In a roadmap published on September 24, the German government set out for the first time an explicit promise of “transitioning away” from fossil fuels. Previous pledges were only for “carbon neutrality.”

SAUDI ARABIA RESTARTS EAST-WEST PIPELINE

Saudi Arabia has restarted its East-West oil pipeline, restoring at least some flow through the 4-million-barrel-per-day route that had become the kingdom's main escape hatch around the Strait of Hormuz. The pipeline is running at a low rate for now, with Aramco working to return flows to roughly 4 million bpd. A full restart could still take weeks.

DAIMLER TRUCK, VOLVO PUSH HYDROGEN-FUELING ECOSYSTEM AT IAA

Truck manufacturers whose four North American brands accounted for a combined 58.3 per cent of U.S. Class 8 sales in the first eight months of 2026 are teaming up with technology and energy companies to build out Germany's hydrogen fuelling infrastructure. The companies have plans for both hydrogen fuel cell electric and hydrogen internal combustion engine trucks.

CUMMINS DEBUTS X15N NATURAL GAS ENGINE IN EUROPE

Cummins debuted its X15N heavy-duty natural gas engine in Europe on September 14, marking the latest step in the manufacturer's push beyond diesel powertrains. The engine maker, which has offered the X15N in North America for the past two years, showcased the natural gas-powered version of its largest truck engine at IAA Transportation.

U.S.

U.S. DIESEL PRICES ON TRACK FOR RECORD YEAR

Diesel prices in the U.S. climbed above the previous weekly record set in 2022 at the beginning of September, and the 2026 annual average is now within striking distance of the record. Gasoline prices, while still elevated, are unlikely at this point to set a new annual record.

AS TRUMP MULLS DIESEL EXPORT BAN, WHAT WOULD IT MEAN FOR CANADA?

U.S. President Donald Trump on September 22 said he backed the idea of a potential U.S. diesel export ban as a way to lower prices for Americans, which experts say may backfire and cost consumers more in the long term, including in Canada. The ban could potentially be over a 90-day period, according to a report from Politico.

CALIFORNIA'S UNANIMOUS BACKING FOR E15 SIGNALS GROWING MOMENTUM FOR LOWER-COST FUEL

The California Legislature's unanimous approval of the E15 Clean-Up Act marks a significant milestone for higher ethanol fuel blends and could accelerate momentum for E15 adoption across major fuel markets. The legislation passed both chambers without opposition, removing remaining regulatory barriers that have prevented retailers from offering E15.

EXXONMOBIL NEARS VENEZUELA OIL DEAL, WSJ REPORTS

ExxonMobil is nearing a preliminary deal to invest in Venezuela's oil fields while negotiating a potential return to the country nearly two decades after its exit. The company could sign a memorandum of understanding with state-run Petróleos de Venezuela by the end of September to explore investing in a number of developed and undeveloped fields.

CANADA

CANADA'S OIL PATCH ON TRACK FOR BIGGEST M&A WAVE IN A DECADE

Canada's oil patch is experiencing another major M&A boom, with more than \$30 billion in deals so far in 2026 and activity potentially surpassing the \$53 billion recorded in 2017. Unlike 2017's distressed-asset sales, today's consolidation is being driven by high commodity prices and strong asset valuations. More consolidation is expected in the coming months.

WESTERN REGION

SHELL-LED LNG CANADA COULD APPROVE PHASE 2 EXPANSION BY EARLY OCTOBER, SOURCES SAY

Partners in the Shell-led LNG Canada export project could reach a final investment decision on its Phase 2 expansion as early as October. The expansion would add a further 14 million metric tonnes per annum (mtpa) of liquefied natural gas export capacity to the facility in Kitimat, British Columbia, effectively doubling the project's total capacity to 28 mtpa.

SURPRISE! BRITISH COLUMBIA IS NOW A MAJOR ENERGY PLAYER

Despite opposition from activists and governments, B.C.'s oil and gas industry is now a key player, with more growth possible. Supporters of British Columbia's natural resource sector have made progress in building a new LNG project and completing an oil pipeline while continuing to develop the province's oil and gas fields.

ELEMENT ONE AND MANTLE8 SIGN LETTER OF INTENT TO ADVANCE NATURAL HYDROGEN EXPLORATION IN WESTERN CANADA

Element One Hydrogen & Critical Minerals Corp. has entered into a letter of intent with Mantle8 SAS, a Grenoble, France-based natural hydrogen exploration company, to evaluate and advance prospective natural hydrogen exploration opportunities in British Columbia and Alberta.



PRAIRIE REGION

FUEL GOOD DAY MARKS 10 YEARS OF GIVING BACK ACROSS WEST-CENTRAL SASKATCHEWAN

Drivers filling up at participating Co-op gas bars September 15 helped support local organizations as Fuel Good Day marked its 10th anniversary. The annual fundraiser sees participating Co-ops donate a minimum of five cents from every litre of fuel sold to a registered charity or non-profit organization in their community.

MAX POWER REPORTS SUCCESS ON RECENT NATURAL HYDROGEN WELLS, DRILLING MORE

MAX Power Mining Corp. reported on September 8 that its ongoing drilling program has continued to find more natural hydrogen. The company said in a release, "Ongoing commercial validation drilling at Lawson Complex 1 in south-central Saskatchewan has successfully triangulated a very large natural hydrogen system with the completion of the Lawson #3 well."

ONTARIO AND QUEBEC

DELIVERY OF NEW BUSES UNDERWAY AS MISSISSAUGA'S TRANSIT FLEET MARKS A FIRST IN ONTARIO

New hydrogen fuel cell electric buses begin arriving in Mississauga this month as the city becomes the first Ontario municipality to include such vehicles as part of its public transit fleet. Following city council approval in September 2024, the City of Mississauga bought 10 40-foot hydrogen fuel cell electric buses that are expected to be on the road by early-to-mid 2027.

ATLANTIC REGION

IRVING OIL ANNOUNCES NEW PRESIDENT AND CEO

Irving Oil has announced the appointment of Austrian oil and gas executive Alfred Stern as its next president and CEO, effective November 1. The appointment follows an 18-month strategic review that ended with the New Brunswick energy giant choosing to remain independent rather than pursue a sale.

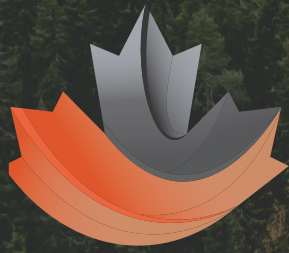
SKYROCKETING OIL PRICE BRINGS IN \$500M TO N.L., SAYS FINANCE MINISTER, HELPING FIGHT DEFICIT

The high price of oil is having a big impact on Newfoundland and Labrador's finances and its looming deficit, says the finance minister, enabling the province to bring in affordability measures. "We [are] looking at \$500 million plus to our coffers as a result of the upswing in oil," Finance Minister Craig Pardy told CBC News September 8.





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Canada's Energy Marketers:
Essential. Reliable. Ethical.**



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CANADIAN ENERGY MARKETERS ASSOCIATION

We want to share the successes of our Members.
If you have recent company achievements or
updates you'd like us to highlight, or would like to
be featured in an upcoming issue,
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