

# CANADIAN METHANE JOBS MARKET ANALYSIS



**An inventory of technology and service providers offering the  
Canadian oil and gas industry tools to reduce methane**

**METHANE EMISSIONS LEADERSHIP ALLIANCE**

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**TECHNOLOGY. PARTNERSHIPS. INNOVATION.**

# INTRODUCTION

## Background

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One of the Government of Canada's global commitments to fight climate change includes reducing methane emissions from the oil and gas industry 40 to 45% below 2012 levels by 2025. Methane, the principal component of natural gas, was targeted as an important greenhouse gas for Canada to reduce as part of the Pan-Canadian Climate Framework (December 2016) and the Alberta Climate Plan (November 2015). To achieve this commitment, producers will have to deploy methane mitigation technologies across the value chain and enlist the services of local businesses to support methane reduction management activities. Methane emission reductions are achievable at low-cost, using readily available technologies to recover leaking or vented methane.

The Methane Emissions Leadership Alliance conducted a market survey in Q1 2017 to identify the current number of methane mitigation companies in

Canada and to assess the potential capacity of this industry to scale with new customer demands for emissions reduction solutions.

This report contains a review of companies with offices located in Canada and the associated number of jobs within each of those organizations related specifically to methane emissions reduction activities. The report does not include jobs from the supply chains that support the technology and service sectors analyzed. The data is broken down by methane source category in order to demonstrate which sources are currently served and to what capacity market demand can be met upon implementation of federal and provincial methane regulations. This report did not seek to quantify the total number of jobs but rather to provide a sense of the scale and opportunities for job creation in this sector. A Phase 2 report is being planned to quantify the total number of jobs.

## About the Methane Emissions Leadership Alliance

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The Methane Emissions Leadership Alliance (MELA) members provide the data, services and technology solutions critical to methane emissions management in the Canadian oil and gas industry. The Alliance is a partner to government, industry, and other key stakeholders, focused on building a clean economy and generating new jobs.

The Alliance serves as a centralized location for technology and service providers to collaborate with industry and government on building a robust economy in a changing regulatory environment. The core objectives of the Alliance include:

- Advance and support the deployment of methane emissions reduction solutions and technologies throughout the oil and gas industry in Canada
- Promote clean, efficient, and cost effective technologies and services that reduce operating costs and minimize regulatory compliance costs for oil and gas producers
- Elevate public awareness and profile of methane emissions reduction technologies
- Educate all levels of government and industry organizations on the value, applicability, and performance results of methane emissions reduction technologies
- Foster and support relationships with mutual stakeholders and partners of methane emissions management

## EXECUTIVE SUMMARY



**There are more than 170 Canadian companies providing methane emissions management solutions**



**40% of companies surveyed anticipate 100%+ growth in headcount due to methane regulations**



**80% of companies surveyed expect job growth in the next 12-18 months as a result of methane regulations**



**More than three-quarters of the companies have offices in Alberta**



**One third of companies provide field inspection services to help their customers manage fugitive emissions**



**This survey does not include small businesses with no internet presence**

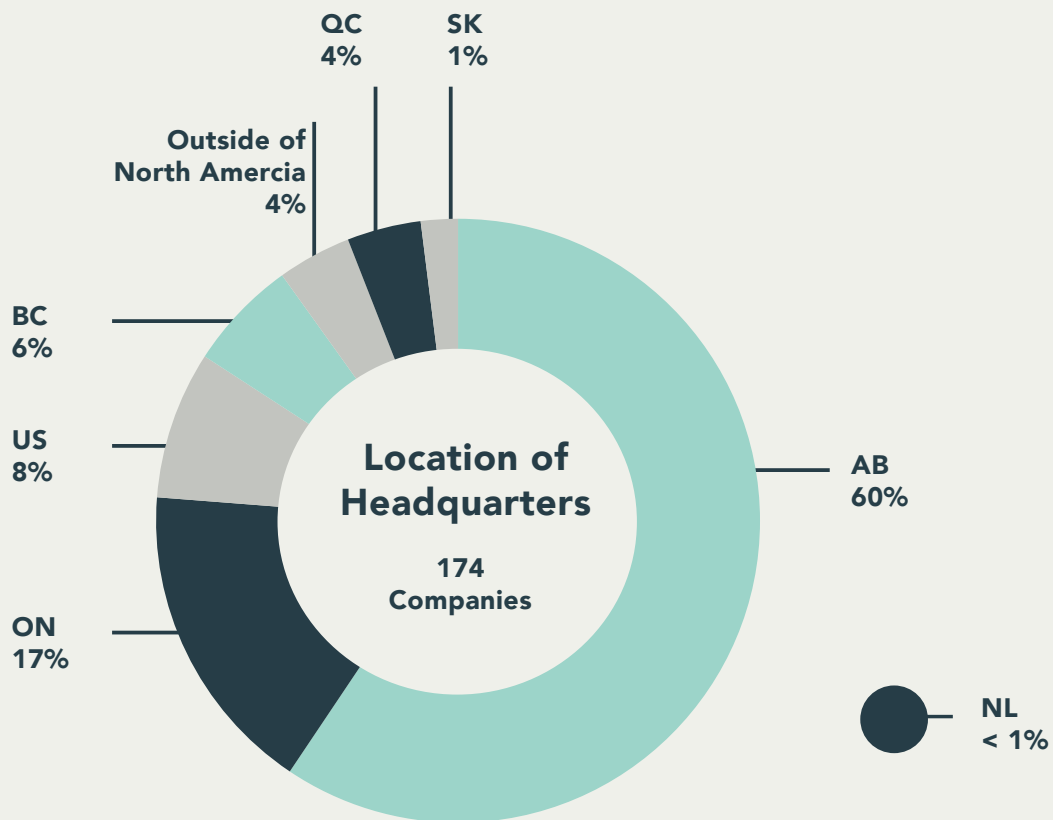
# METHANE MITIGATION: BY THE NUMBERS



## Geographic Reach

More than half of the technology and service providers identified are headquartered in Alberta. A few organizations with US or international headquarters have satellite offices located in Canada that provide methane related services to the oil and gas industry. Data shows that 78% of identified companies are either headquartered or have

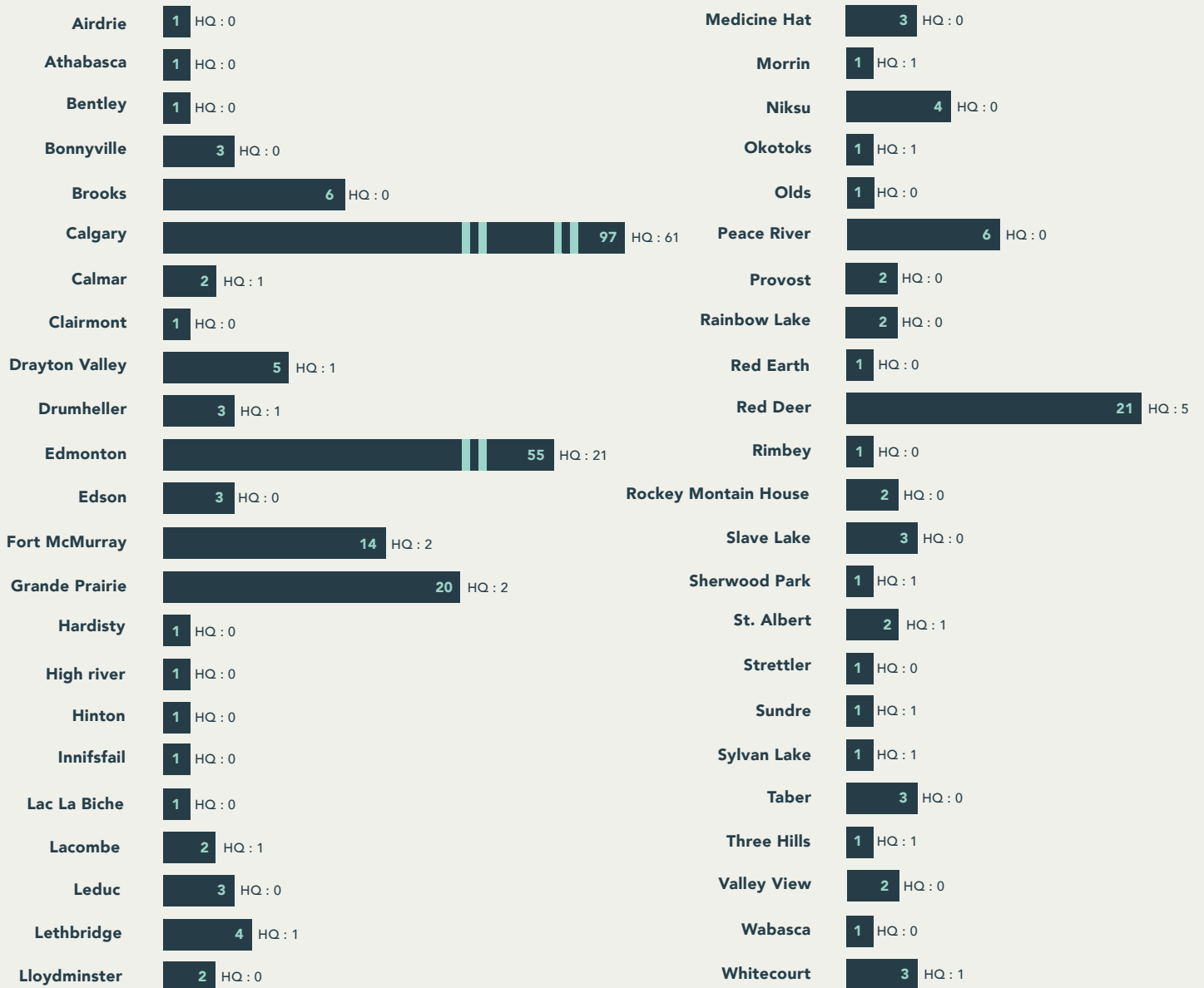
a satellite office in Alberta. One company interviewed explicitly mentioned that there are stronger oil and gas methane regulations in the United States and unless Canada develops comparable regulations, it may be more cost-effective to move some jobs from Canada to the U.S.



# METHANE MITIGATION: BY THE NUMBERS

## Office Locations in Alberta

■ Number of Offices  
 HQ: ■ Number of Offices That Are Headquarters



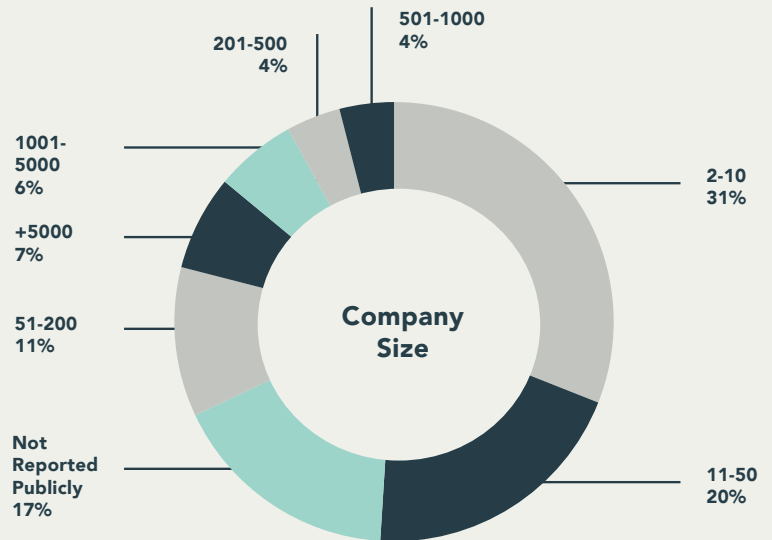
Totals ■ Number of Offices - 292 HQ: ■ Number of Offices That Are Headquarters - 104

# METHANE MITIGATION: BY THE NUMBERS



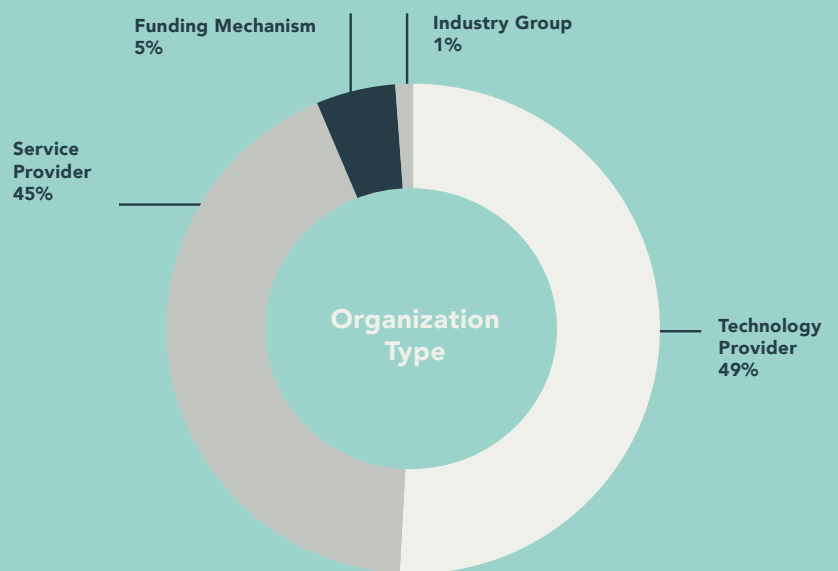
## Company Size

Company size is determined by publicly available data on total employees unless informed by a specific company survey response. Therefore, some figures exceed the number of jobs directly associated with methane mitigation technologies and services within the organization.



## Company Type

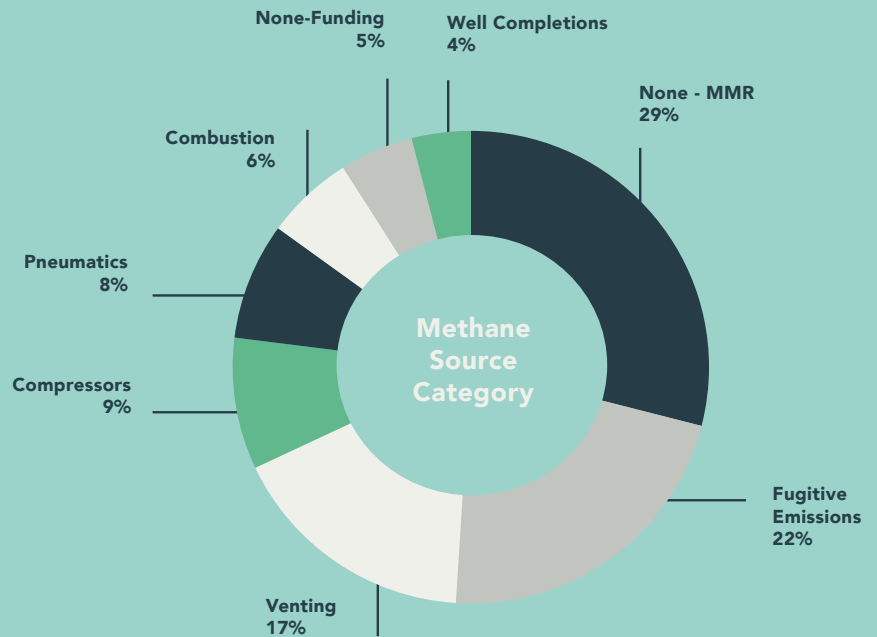
Organizations are characterized by the following categories: Technology Provider, Service Provider, Funding Mechanism, or Industry Group. This study did not include government or regulatory bodies.



# METHANE SOURCE CATEGORY

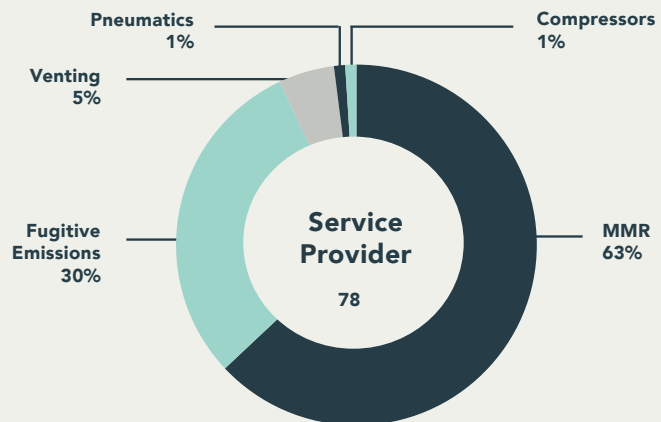
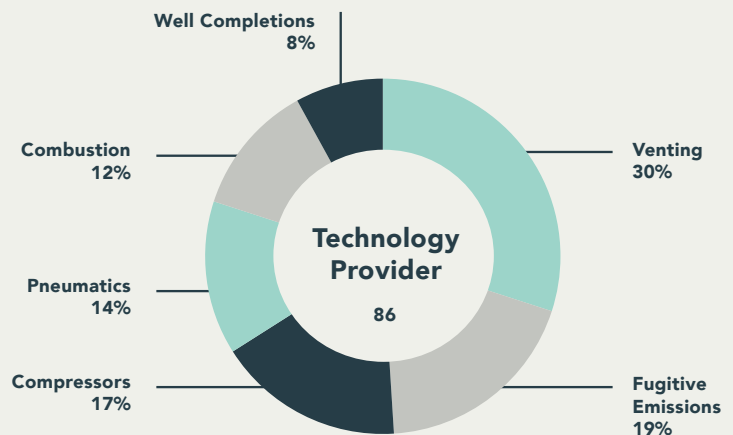
## Overview

Canadian methane mitigation companies are evaluated by the methane source category to which their technology or service applies. These emissions source categories are informed by Canadian Federal and Alberta regulatory developments. They include: Combustion, Compressors, Fugitive Emissions, Pneumatics, Venting, Well Completions, Funding, Measurement, Monitoring and Reporting (MMR).



## Providers

The following two charts demonstrate the breakdown of methane source categories by the two largest Organization Types: Technology and Service. Companies designated as MMR (Measurement, Monitoring and Reporting) are classified as a Service Provider and represent the highest percentage of organizations in this offering category due to the diversity in services covered. The 23 fugitive emissions service providers largely conduct leak detection and repair services. This segment is expected to grow under the likely three times per year federal leak detection requirements.



# A CLOSER LOOK: METHANE MITIGATION SURVEY RESULTS

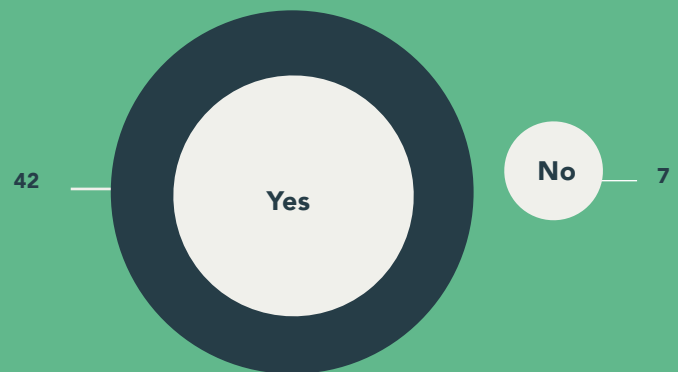
## About the Survey

With the upcoming release of draft Federal and Provincial methane emissions reduction regulations, the Methane Emissions Leadership Alliance surveyed 174 companies identified as being directly involved in methane emissions

management in the Canadian oil and gas industry. Each company was asked 5 questions to help determine an accurate employee count and the job growth potential for this sector as a result of new methane rules. At the time of publication, 49 organizations had provided a response. Only raw data was used below. No assumptions or extrapolations were made.

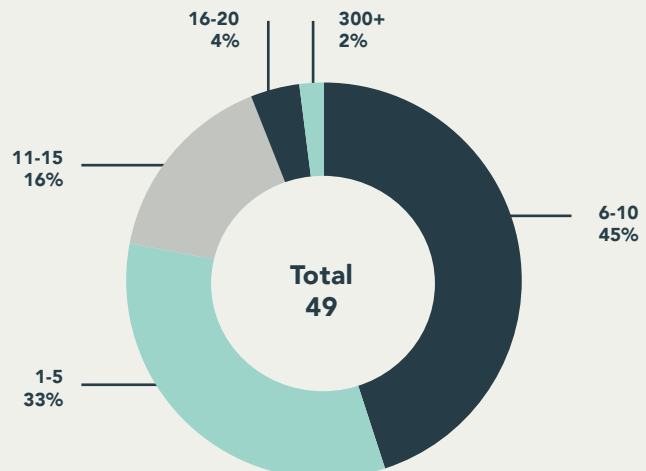
### QUESTION 1

**Do you engage with government and/or regulators on methane regulations in Canada?**



### QUESTION 2

**How many employees are directly related to methane?**

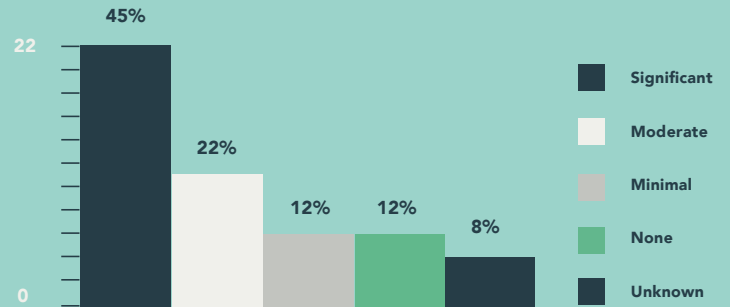




# A CLOSER LOOK: METHANE MITIGATION SURVEY RESULTS

## QUESTION 3

How would you estimate your potential business growth as a result of the regulations?



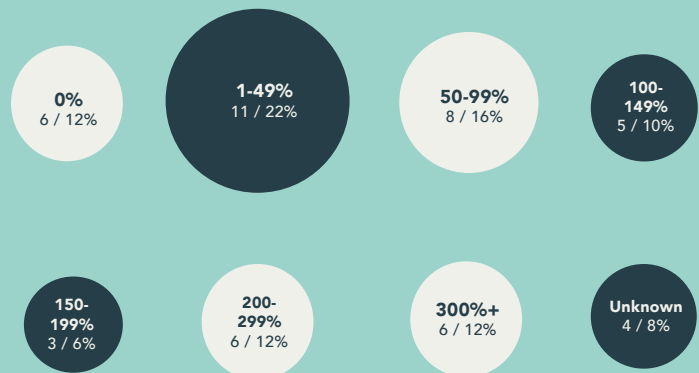
## QUESTION 4

How many people will you hire in the next 12-18 months as a result of the new regulations?



## QUESTION 5

How will your organization grow, as a percentage of existing headcount as a result of the proposed methane regulations?



# COMPANIES

3PAnalysis and Consulting  
Able Seal and Design Inc  
ACCURATA Inc.  
ACS (Applied Compression Systems)  
ACTIA (Alberta Clean Technology Industry Alliance)  
Advanced Coil Tubing Inc.  
AEREON  
Aeryon Labs  
AET Group Inc.  
AirDar Technology  
AIRTEK SYSTEMS Inc.  
Alberta Innovates Energy and Environmental Solutions  
Alberta Welltest Incinerators  
Amberg Corp.  
AMEC Americas Limited  
AMEC Earth and Environmental  
ARCADIS Canada Inc.  
Atlantis Labs  
ATZ Applied Technologies  
BalanceCO2 Ltd.  
Bechthold & Becker  
Beta Machinery  
Black Gold Rush Industries  
Blair Air System  
BlueSource  
BOREAL  
Brahma Compression  
BrezaWorks & Consulting Inc.  
Brightspot Climate  
Bruin Pumps  
CALSCAN Solutions  
Cameron Instruments  
Canadian Pump and Packing Co  
CanDyne Inc  
CAP-OP  
Carbon Quantum Inc.  
Cenco wireline Inc.  
Central Inc  
C-FER Technologies Inc.  
CH2M HILL Canada Limited  
ClearSky Engineering Inc.  
Clearstone Engineering  
ClydeUnion Pumps  
CMC Research Institutes  
Colfax Fluid Handling  
ComEnCo Systems Inc  
Compass Oil and Gas Solutions Ltd  
Conestoga-Rovers & Associates (GHD Canada)  
Consultants Enviroconseil  
COSIA (Canada's Oil Sands Innovation Alliance)  
DARKAI Valve  
Deloitte and Touche LLP  
Delphi Group  
EagleBurgmann Canada  
Ecometrica (Canada) Limited  
Emission Control International Ltd  
ENERFLEX

Energy Profiles Limited  
Enviro Trace Ltd  
Enviro-access Inc.  
Envirosoft  
Envirotech Engineering  
Envision Manufacturing and Supply Ltd.  
Epscan  
Ernst & Young LLP  
Evergreen Energy Technologies Inc.  
Extreme Telematics Corp. (ETC)  
FERUS  
First Environment, Inc.  
FLIR  
FMC Technologies  
Forum Energy Technologies  
Freudenberg Oil & Gas  
Gas Recon Inc.  
GASPRO Compression Corp.  
GE (General Electric)  
General Magnetic  
GHGSat  
Global Energy Services (2011)  
Green Sky Sustainability Consulting Inc.  
Greenpath Energy  
Hallite Seals Ltd  
HC Piper Manufacturing Inc  
Heat Seeking Thermal Imaging LTD  
Hetek  
Hi-Tech Seals  
HSE Integrated  
Illusense  
Industrial Skyworks  
Infratech Corporation  
Insight Emissions Management Inc  
Internat Energy Solutions Canada Inc.  
InterPraxis Consulting  
IRIS (Infrared Imaging Solutions)  
John Crane Canada Inc  
K.C. Seals Inc.  
Keystone Environmental  
Kinetica Ventures  
Kineticor  
KPMG Performance Registrar Inc.  
Kuzuka Ltd.  
LCO Technologies  
Levelton Consultants Ltd. (WSP)  
Linewise Aerial  
LOOKNORTH  
LUXMUX  
MCI Solar MFG LTD  
Millenium EMS Solutions Ltd.  
MNP LLP  
Modern West Advisory  
Morrison Hershfield Ltd.  
National Oilwell Varco  
Nelgar  
New Paradigm Engineering Ltd  
Nexsource  
North Shore Environmental Consultant  
Nsolv Corp.  
Opgal

OptaSense  
Pace Technologies  
Parker  
Pason Systems Inc.  
Petro Techna International Ltd.  
Power Diagnostic Technologies Ltd.  
PricewaterhouseCoopers LLP  
Process Ecology  
PTAC (Petroleum Technology Alliance Canada)  
Pure Technologies Ltd.  
Quest Gasket & Supply Inco  
Questor  
R.J.A. Contracting Ltd.  
Raise Production Inc.  
Rapid Rod Service  
Raymond Chabot Grant Thornton LLP  
REM Technology (Reciprocating Equipment Management)  
RME geomatics  
Robco Inc.  
Roska DBO Inc  
Rotech Pumps & Systems Inc.  
SafeSeal Valve Systems Corp.  
SafetyScan  
SAGE Energy Corp  
SAI Global  
Saskatchewan Research Council (SRC)  
Sirius Controls  
SNC-Lavalin  
Solar West  
SPARTAN Controls  
Stantec Consulting Ltd.  
Stimline  
StreamFlo  
Sustainable Development Technology Canada  
Synodon Inc  
Tanknology Canada Inc.  
Target Emissions Services  
Tarpon  
TCI Incinerators  
Tec Edmonton  
Tenaris  
TETRA TECH  
Titanium Corporation  
T-RAM Canada Inc.  
Triangle Fluid Controls Ltd.  
TRIDO Industries  
Tundra Process Solutions  
TüV Rheinland Energie und Umwelt GmbH  
Unified Valve Group LTD  
VaporTech  
Vapure Engineering Ltd.  
Williams Engineering Canada Inc.  
Winterhawk Well Abandonment  
Wise Intervention Services Inc.  
Yokogawa Canada  
ZEECO

**For more information  
on the Methane Emissions  
Leadership Alliance,  
please visit us at  
[www.methanealliance.ca](http://www.methanealliance.ca)**