

**LAT60**  
explore

APRIL 2019

# Alberta Industry Intelligence Report

This is your up-to-date information source on Alberta industry.

The material summarized in this report comes from the LAT60explore map.



Q1 Update: Syncrude Canada is the company with the most well licences granted, obtaining a total of 228.



In the first quarter of 2019, the Grande Prairie Region has become one of Alberta's oil and gas industry hotspots – ranking 1<sup>st</sup> in pipeline licences granted and 2<sup>nd</sup> in well site disposition licences approved.

**Pipeline Update:** A total of 677 pipelines had their licences approved in Q1 of 2019.

## Datasets Included on the LAT60explore Platform

- Oil Sands Deposits
- Mineable Oil Sands Project Locations
- In Situ Oil Sands Project Locations
- Well Sites
- Pipelines
- Sand & Gravel Exploration and Development
- Industrial Work Camps
- Industrial Waste Disposal Facilities

This edition of our Alberta Industry Intelligence Report is going to summarize and present information to help you identify:

- **Customer trends** – to help locate potential customers for your business, and;
- **Competitor activity** – to show you what your competitors are up to.

The summaries contained within this report have been created using the data obtained from the [www.lat60explore.com](http://www.lat60explore.com) platform. The platform was conceived to help provide businesses in Alberta with access to information that can be used to expand their operations.


Over the years, we have learned that the quantities of data available are so vast, and in so many different places, that the complexity of turning it into useful knowledge is challenging. If you are sorting through a boundless abundance of facts and figures, visiting many different websites, and sifting through reams of excel documents – then you are doing it the hard way. The real challenge we face is too much data and

too little actionable information that can be turned into strategic intelligence.


Therefore, we have taken these vast quantities of data and distilled it down to useful charts, figures, and maps that we think will provide Alberta’s business leaders with the information they need to continue growing their businesses.

The data for this report is taken from a period of two months before the report’s release month. This is due to the status-quo within the oil and gas industry where well sites are, on average, constructed two-to-six months after a disposition licence approval is granted. This is similar for pipeline dispositions as they are constructed two-to-twelve months following their approval. As the vast majority of the Alberta economy is based on the oil-and-gas industry, effects from its activity trickle-down to other industries.

If any of the data summaries displayed here lead you to ask more in-depth questions, please contact us. Our professional team is available to answer any custom inquiry that you may have.




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### In the News

#### Oilpatch hopes investment flows back to Alberta after big Kenney win

After four years of declining investment in Alberta’s oil and gas sector, the industry is hopeful a swift change in government will bring an equally quick return of fortunes for the oilpatch.

Voters showed Rachel Notley’s NDP the door on Tuesday; Jason Kenney’s United Conservative Party will now have a majority government.

It’s exactly what many oil and gas companies wanted to see, despite how much credit they give Notley for her performance during her single term in power... [read more](#)

# Summary of Activity on Public Lands

## Dispositions on Public Land in Alberta

The ability to use public land in Alberta is granted to a potential user through a land-use contract. This contract is executed under the Public Lands Act and is called a disposition. A three-letter code is used to identify each type of disposition.

There are a variety of dispositions that get issued, such as those summarized in the table below:

Code	Description	Type of Activity
DLO	Licence of Occupation	Road
DML	Miscellaneous Lease	Miscellaneous
DPI	Pipeline Installation Lease	Riser Site
DPL	Pipeline Agreement	Pipeline
DRS	Disposition Reservation	Government Disposition
EZE	Easement	Powerline
LOC	Licence of Occupation	Road
MLL	Miscellaneous Lease	Storage Site/Plant Site
MSL	Mineral Surface Lease	Well Site
PEZ	Easement	Tourism, Parks and Recreation Easement
PIL	Pipeline Installation Lease	Riser Site
PLA	Pipeline Agreement	Pipeline
PLC	Community Development Licence of Occupation	Road
PML	TP&R Miscellaneous Lease	
PMS	TP&R Mineral Surface Sale	
PPA	Pipeline Agreement	Pipeline
PSM	TP&R Surface Material Lease	
RDS	Roadway	Roads
RRD	Registered Roadway	Roads
RVC	Vegetation Control Easement	Powerline
SMC	Surface Material Licence	Sand and Gravel Licence
SME	Surface Material Exploration	Sand and Gravel Exploration
SML	Surface Material Lease	Sand and Gravel Lease
VCE	Vegetation Control Easement	Powerline

### In the News

#### Potential Trans Mountain pipeline buyer says it agrees with federal principles

A First Nations consortium planning to offer \$6.8 billion for majority ownership of the Trans Mountain pipeline and its expansion is welcoming federal government principles for Indigenous buyers announced Monday.

The government's continued endorsement of Indigenous ownership is "fantastic news," said Shane Gottfriedson, director for British Columbia for the group calling itself Project Reconciliation.

"This is one hell of an opportunity for all of our First Nations to look at our own reconciliation through this pipeline and build unity among many of our nations," added the Kamloops resident, who is a former chief of the Tk'Emlups te Secwepemc First Nation and a former B.C. regional chief for the Assembly of First Nations...

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> Summary of Activity on Public Lands Continued

The following table shows the area (in hectares) of all new dispositions (excluding sand, gravel, clay, and peat exploration) – issued for an area of at least one hectare – in each region of the province with an effective date in February of 2019:

Service Region	Area (ha)
Grande Prairie	203
Whitecourt	107
Rocky Mountain House	86
Hinton	56
Edson	53
Slave Lake	47
Drayton Valley	33
Cold Lake	23
Lac La Biche	16
Conklin	14
Peace River - Manning	10
Wabasca	9
High Level - Rainbow Lake	5
Hardisty	4
Lloydminster	2
Fort McMurray	2
Medicine Hat	1
Lethbridge	1
<b>GRAND TOTAL</b>	<b>672</b>



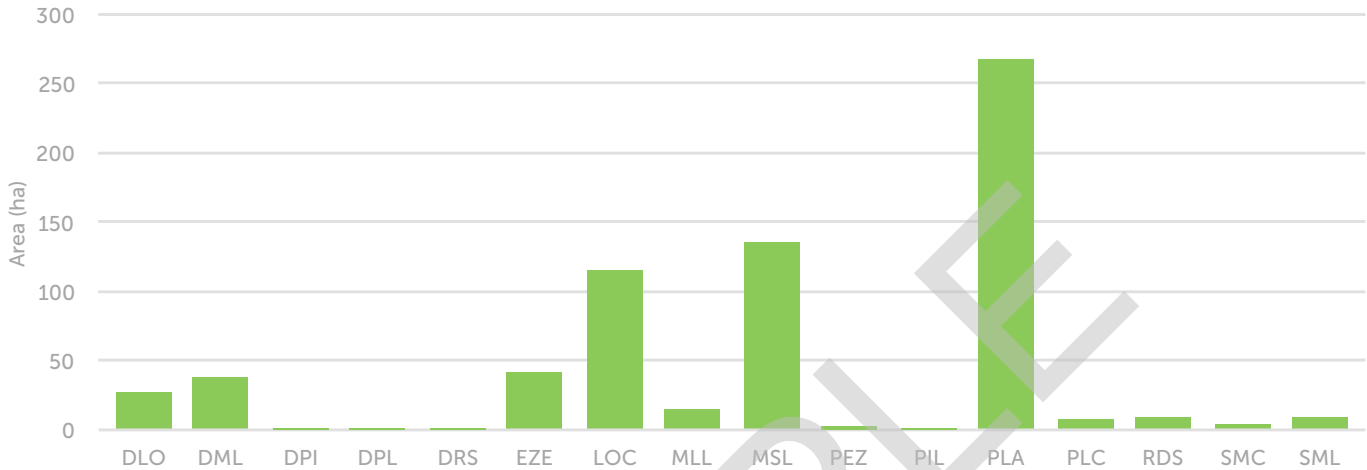
Regions of Alberta



> Summary of Activity on Public Lands Continued

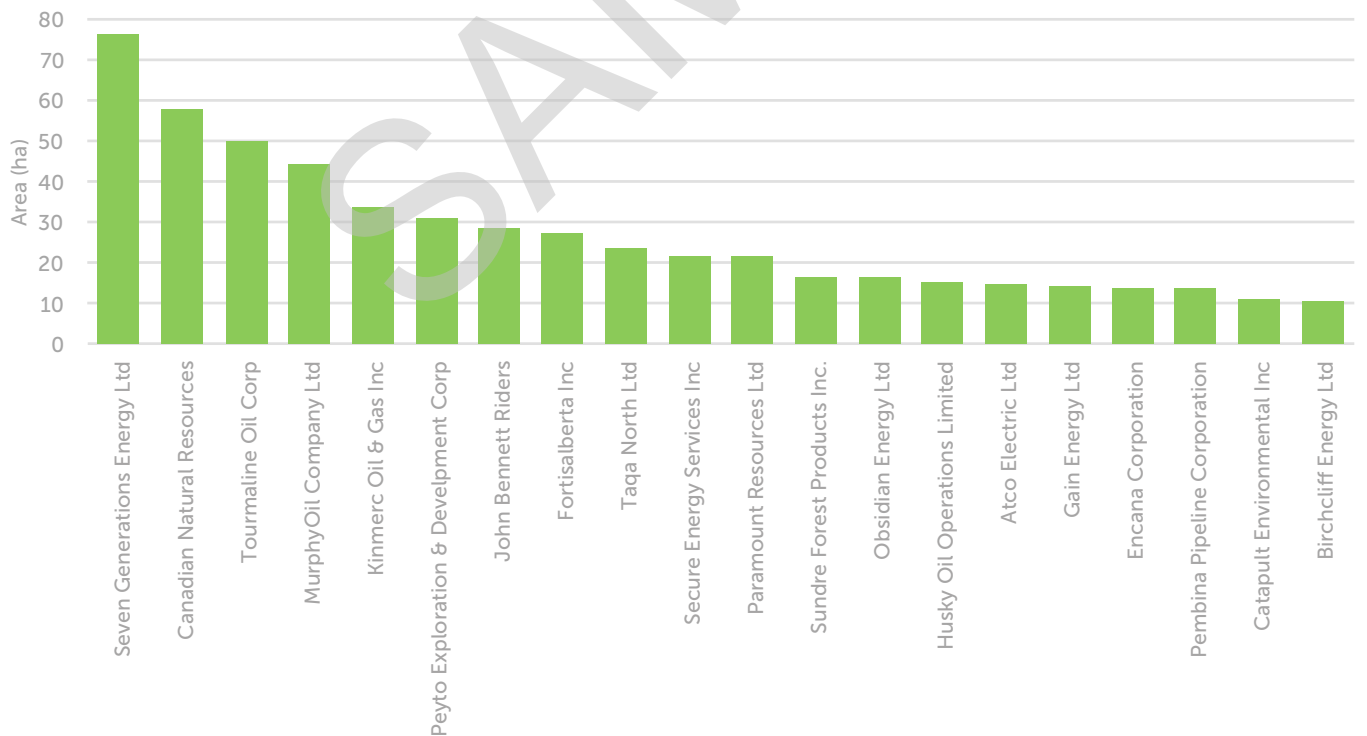
The following graph summarizes the area (ha) of dispositions issued by type of activity (excluding sand, gravel, clay, and peat exploration) within the province of Alberta with an effective date in February of 2019:

**February 2019: Total Area of Dispositions by Type**



The following graph shows the amount of area taken out in dispositions (excluding sand, gravel, clay, and peat exploration) by the 20 companies that had the most activity in the province for the month of February 2019:

**Total Area of Dispositions per Company: Top 20 in February 2019**



# Well Site Activity versus Drilling Activity

## Well Sites

To drill for oil and gas on public lands, the company must first obtain a disposition that allows for this (on private lands in Alberta, there are no dispositions needed for well sites). The disposition type that is issued to allow companies to build a well site on public land is called a Mineral Surface Lease (MSL). The MSL must be in place, and the well site built, prior to a company beginning the drilling process.

This dataset allows you to see what companies are expecting to be drilling in specific regions, long before they start drilling. It is important to know this as, from the perspective of your sales efforts, you will have a good understanding of how much activity different companies expect to have over the coming months.

The following set of graphs provides a summary of planned and actual drilling activity – first by the most-active companies, and then by region (all summaries are for the month of February 2019):

February 2019: Planned versus Actual Drilling Activity per Region



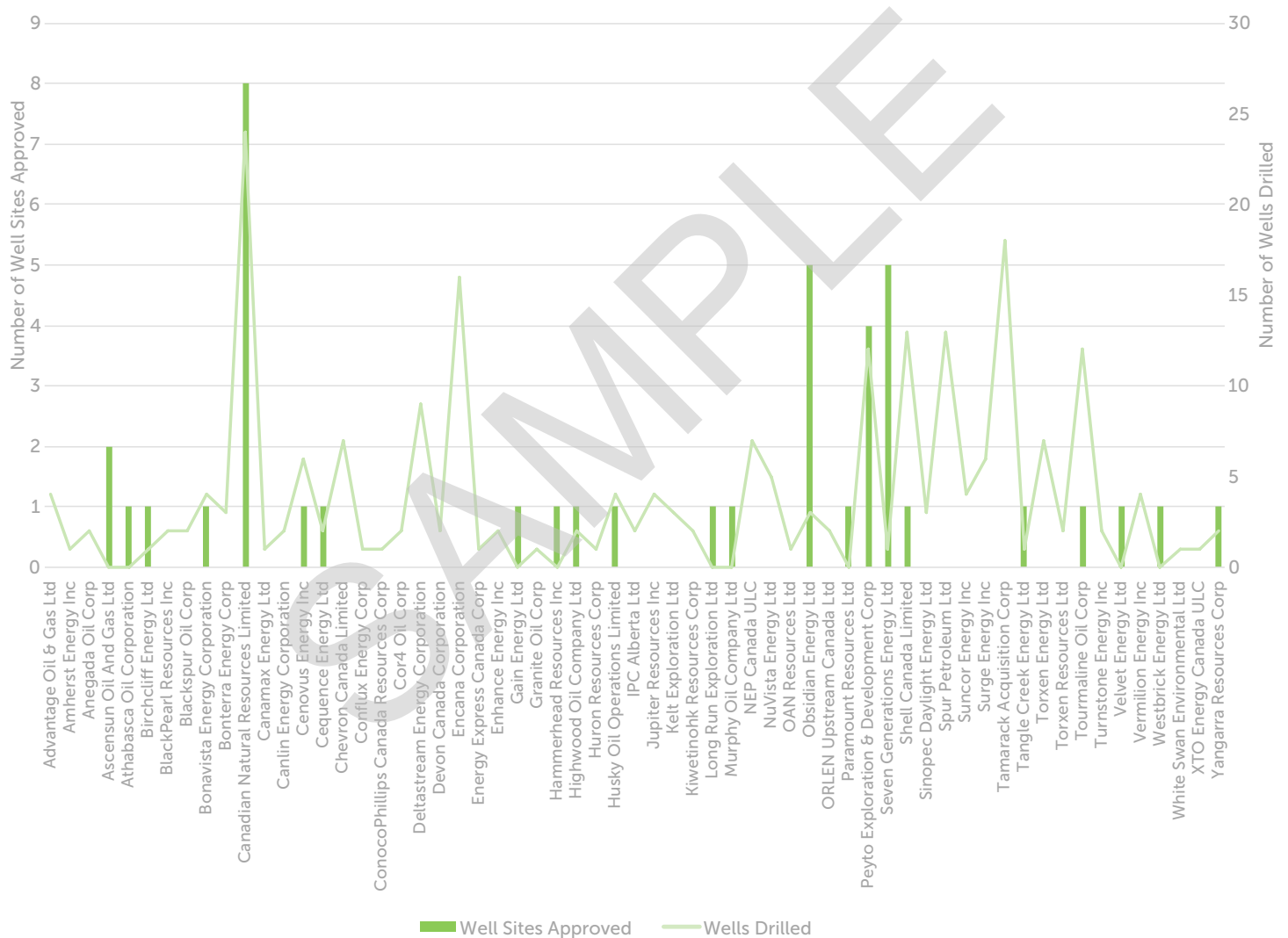
> Well Site Activity versus Drilling Activity Continued

Drilling

Drilling for oil or gas occurs after the well site has been approved and built on public lands. In Alberta, companies are required to obtain a licence prior to drilling and notify the Alberta Energy Regulator (AER) of their drilling activity. The AER makes this data available through products such as ST37: List of Wells in Alberta.

Information derived from this dataset shows who is actively drilling as of the period stated.

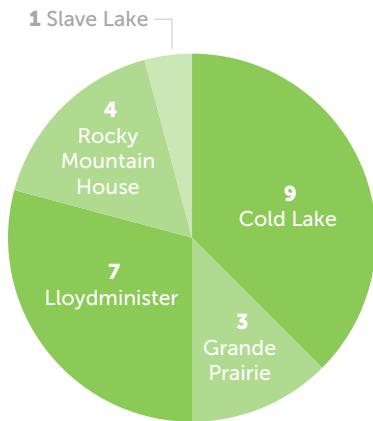
February 2019: Planned versus Actual Drilling Activity per Company



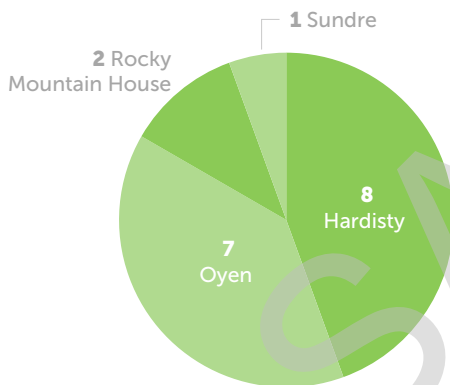
> Well Site Activity versus Drilling Activity Continued

The following pie charts depict the detailed activity, by region of Alberta, for the five most-active companies in February of 2019:

**Canadian Natural Resources Limited:  
Wells Drilled by Region in February 2019**



**Tamarack Acquisition Corporation:  
Wells Drilled by Region in February 2019**



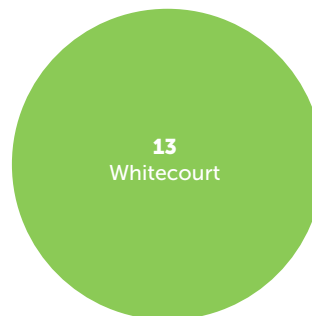
**Spur Petroleum Ltd.:  
Wells Drilled by Region  
in February 2019**



**Encana Corporation:  
Wells Drilled by Region  
in February 2019**

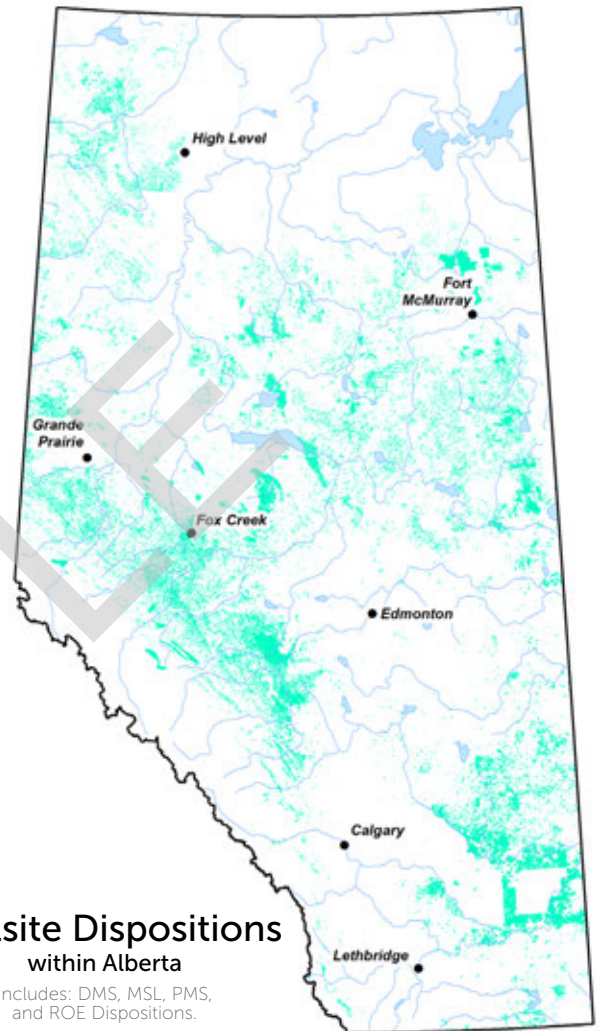


**Shell Canada Limited:  
Wells Drilled by Region  
in February 2019**



**Wellsite Dispositions  
within Alberta**

Includes: DMS, MSL, PMS,  
and ROE Dispositions.



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