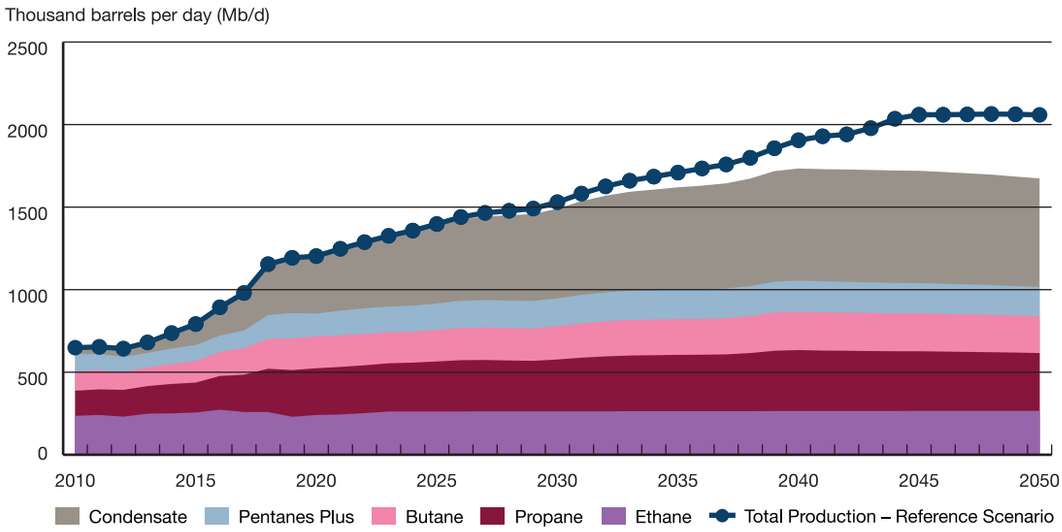
Natural Gas Liquids

CANADA'S ENERGY FUTURE 2020

Natural Gas Liquids (NGL) Production — Evolving Scenario

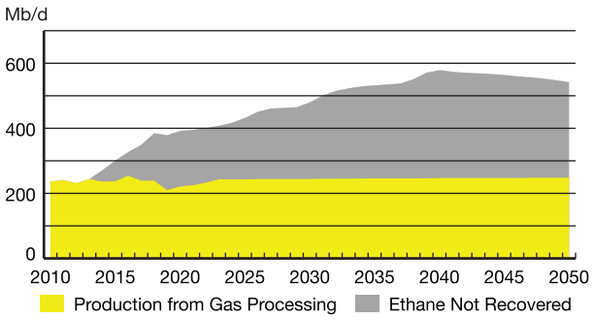


88%
Condensate increase over the projection

Potential

NGL production depends on natural gas production. In the Evolving Scenario, natural gas and NGL production rises over the next two decades and then declines to 2050. Natural gas activity continues to focus on liquids-rich tight and shale gas areas. The Reference Scenario has higher natural gas and NGL production projections. Increasing NGL production means greater potential for growth in petrochemical production and NGL exports.

Ethane Potential — Evolving Scenario



Ethane produced depends on the capacity of the petrochemical facilities in Alberta. Ethane produced in excess of this capacity is reinjected back to be consumed by end users as natural gas.

Canadian Exports and Imports — Evolving Scenario

Evolving Scenario	2010	2020	2030	2040	2050
Ethane, thousand b/d (Mb/d)					
Imports	0	93	134	134	134
Propane, Mb/d					
Exports	81	218	218	279	263
Imports	6	20	25	25	25
Butane, Mb/d					
Exports	24	80	62	98	91
Imports	12	11	11	11	11
PP and Condensate, Mb/d					
Net Imports	128	80	71	-98	-88

For more information on Canada's Energy Future, please visit: https://www.cer-rec.gc.ca/energyfutures

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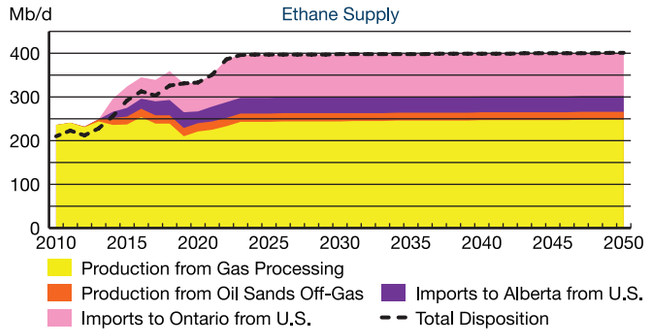
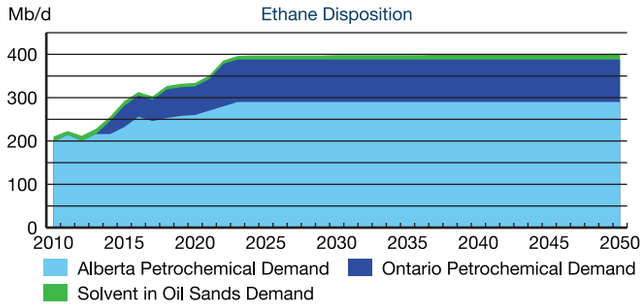
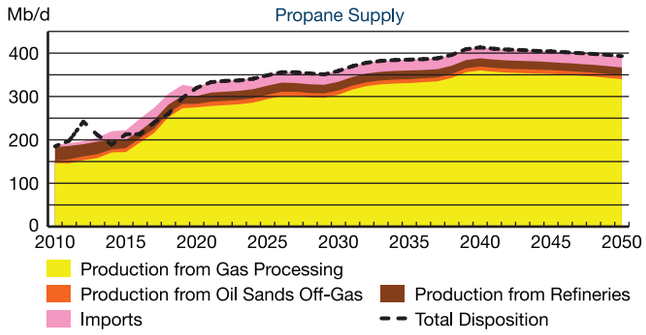
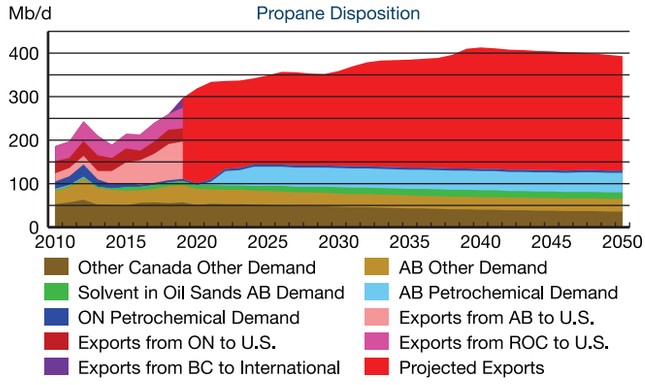
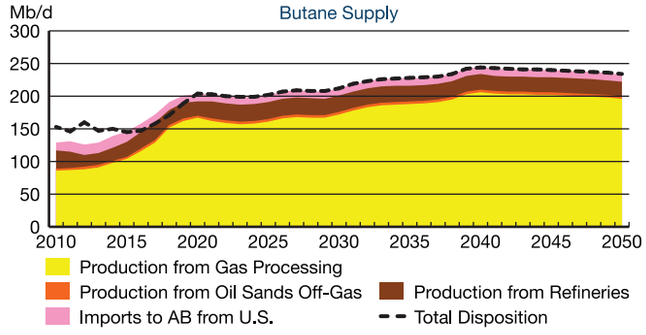
Supply versus Disposition — Evolving Scenario

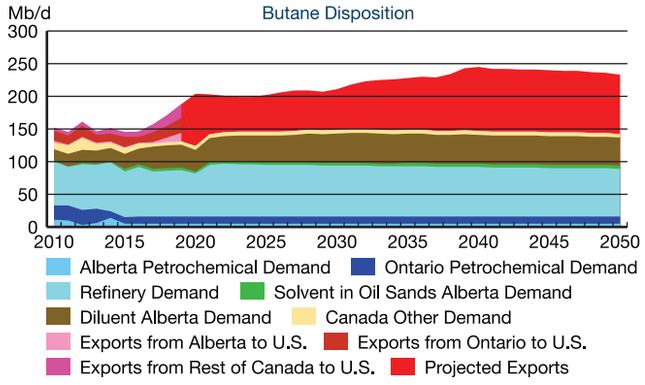


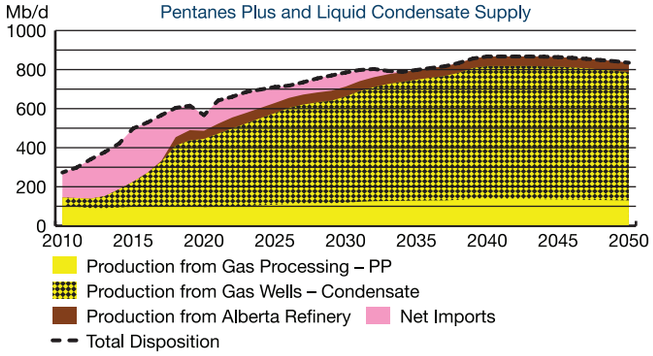


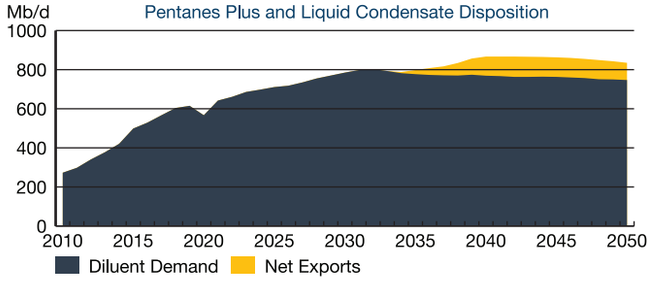












Find these figures and additional data in the downloadable Excel file at
http://www.cer-rec.gc.ca/en/data-analysis/canada-energy-future/2020naturalgas-liquids/index.html