

Capacity & Opportunity for Growth in the Methane Mitigation Sector

METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.

METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.

ABOUT MELA

The *Methane Emissions Leadership Alliance* (MELA) is an **industry association** of North American methane mitigation **technology and service providers**. MELA was formed in 2016 to provide data, services and technology to Canada's oil and gas industry and to help the sector work **collaboratively** with their customers, governments, regulators and other **key stakeholders** on building a **robust economy** in a changing regulatory environment.

METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.






















18

Member organizations from
throughout North America









METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.



MELA ABOUT US

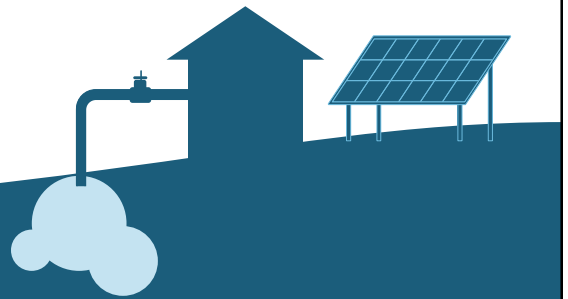


Methane Reduction Technologies & Services:

- Clean Combustion
- Emissions Calculation & Tracking Software
- Fluid Sealing Technology
- Fugitive Emissions Aerial Leak Detection
- Instrument Air Systems
- Mobile Measurement, Monitoring, Testing
- Offset Financing & Advisory Services
- Optical Gas Imaging
- Solar Power Chemical Injection
- Vent Gas Capture & Low Vent Instrumentation
- Zero Emission Separator Package

METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

MELA ABOUT US



CANADIAN METHANE JOBS MARKET ANALYSIS



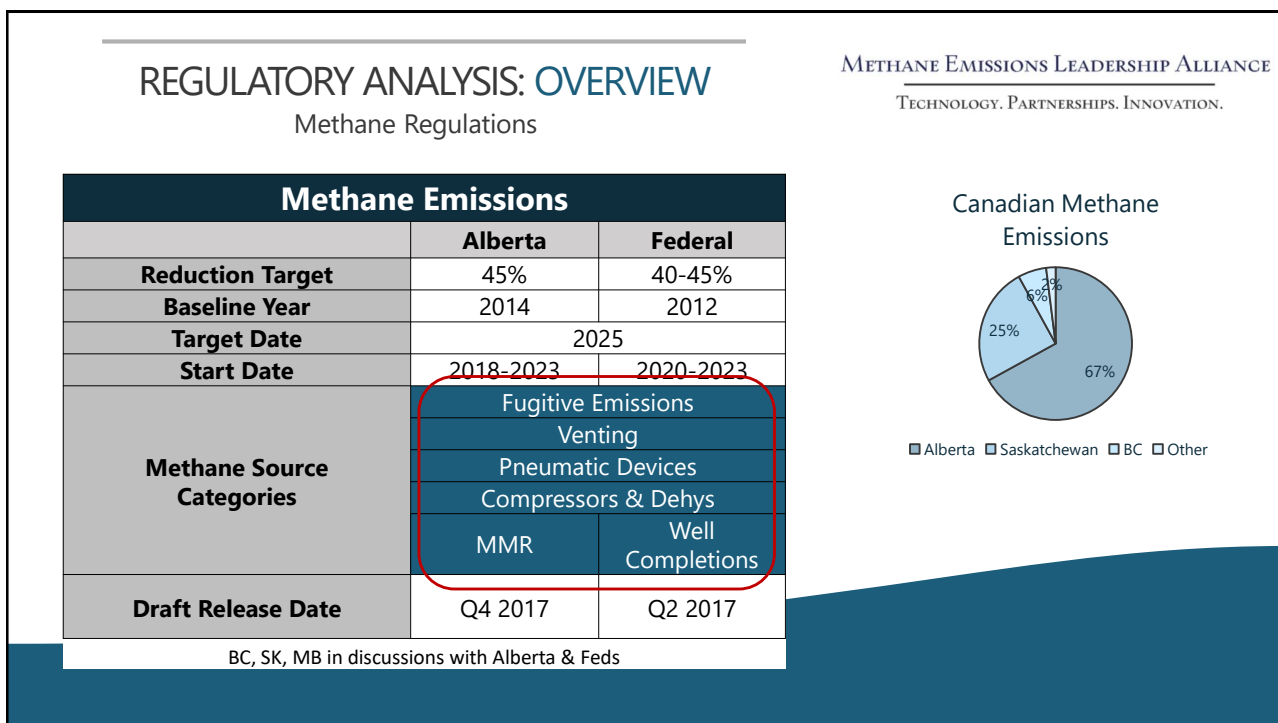
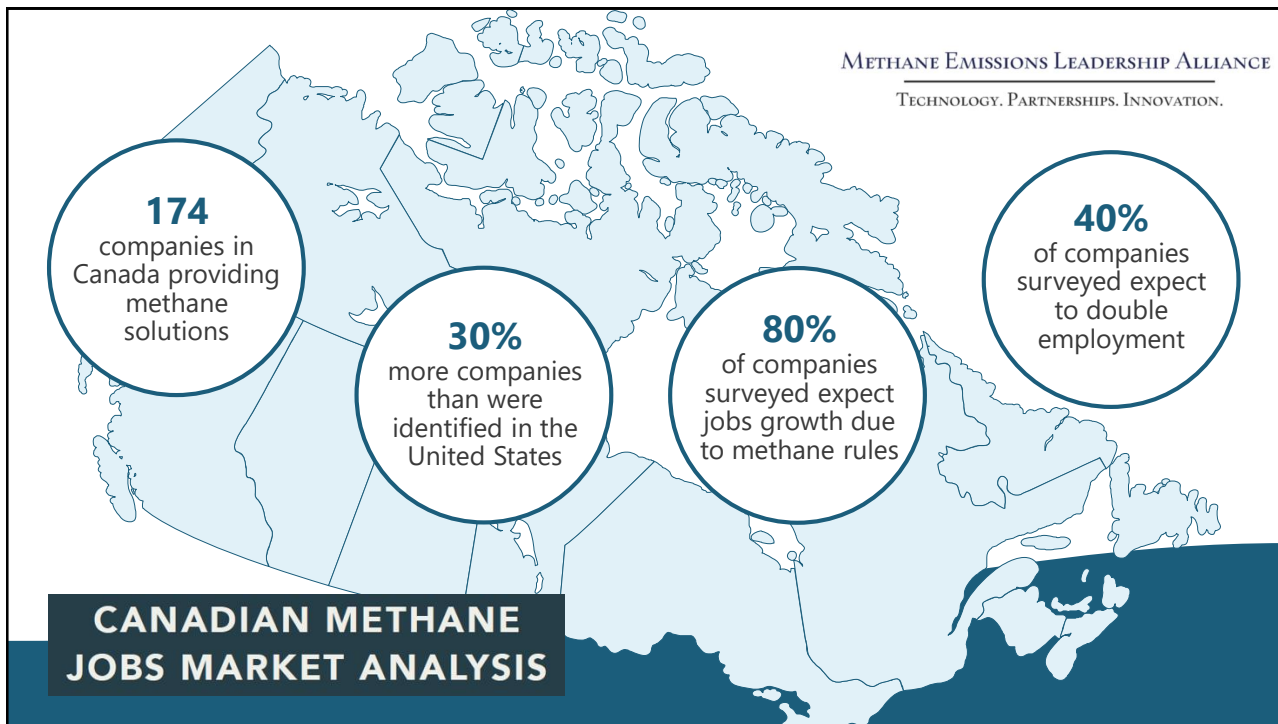
An inventory of technology and service providers offering the
Canadian oil and gas industry tools to reduce methane

METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

SPRING 2017





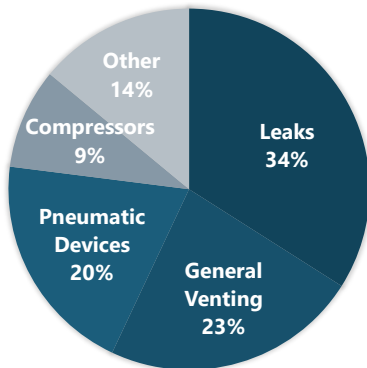
REGULATORY ANALYSIS: OVERVIEW

Methane Regulations

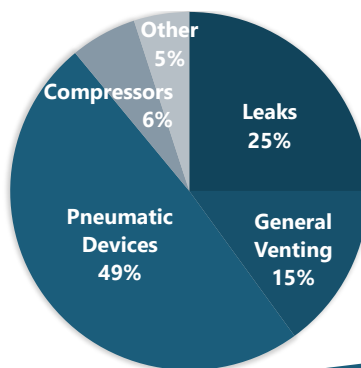
METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.

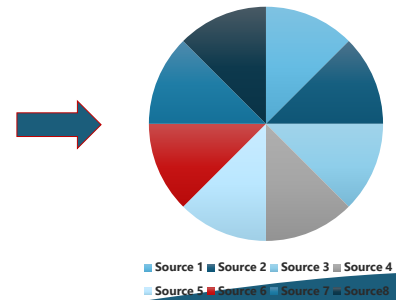
Federal Level Emissions



Alberta Level Emissions



Providers By Source Category

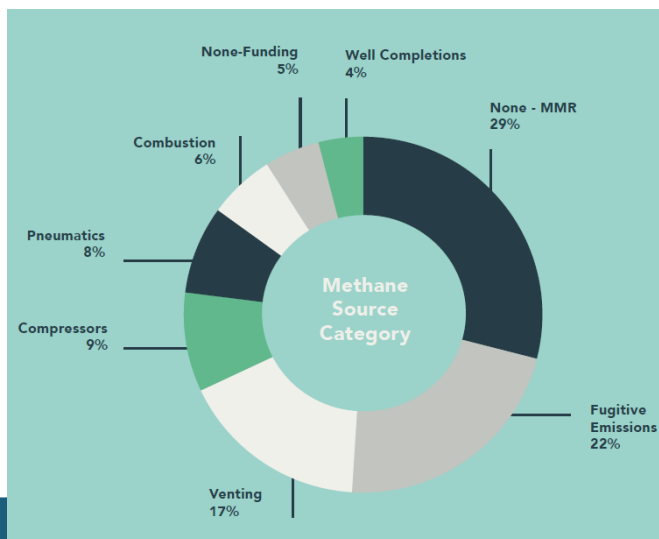


RESEARCH: OUTCOMES

Jobs Market Analysis

METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.



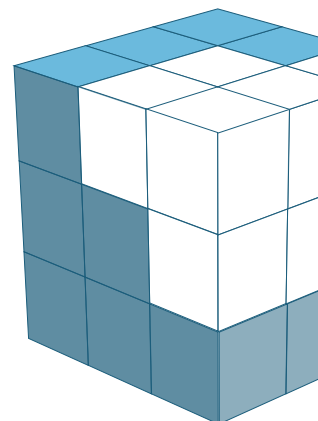
Source Category	TOTAL
Combustion	10
Compressors	16
Fugitive Emissions	38
Pneumatics	14
Venting	30
Well Completions	7
None - Funding	9
None - MMR	50
174 total companies	# of companies identified

RESEARCH ANALYSIS: OVERVIEW

Jobs Market Analysis

METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.



Source Category	TOTAL	Federal	Alberta
Combustion	6%	14%	5%
Compressors	9%	9%	6%
Fugitive Emissions	22%	34%	25%
Pneumatics	8%	20%	49%
Venting	17%	23%	15%
Well Completions	4%	14%	5%
None - Funding	5%	n/a	n/a
None - MMR	29%	n/a	n/a
174 total companies	% of companies identified	% Emissions by Source Category	

RESEARCH ANALYSIS: GROWTH

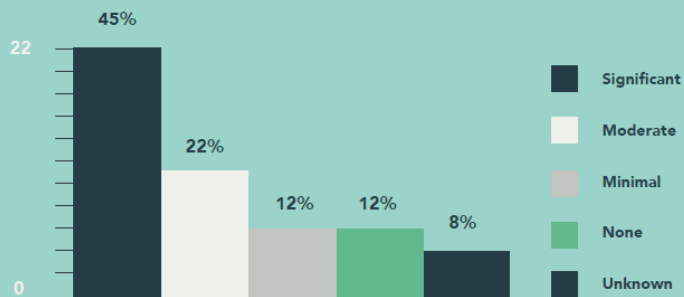
Jobs Market Analysis

METHANE EMISSIONS LEADERSHIP ALLIANCE

TECHNOLOGY. PARTNERSHIPS. INNOVATION.

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

Significant = 81%+
 Moderate = 31-80%
 Minimal = 1-30%



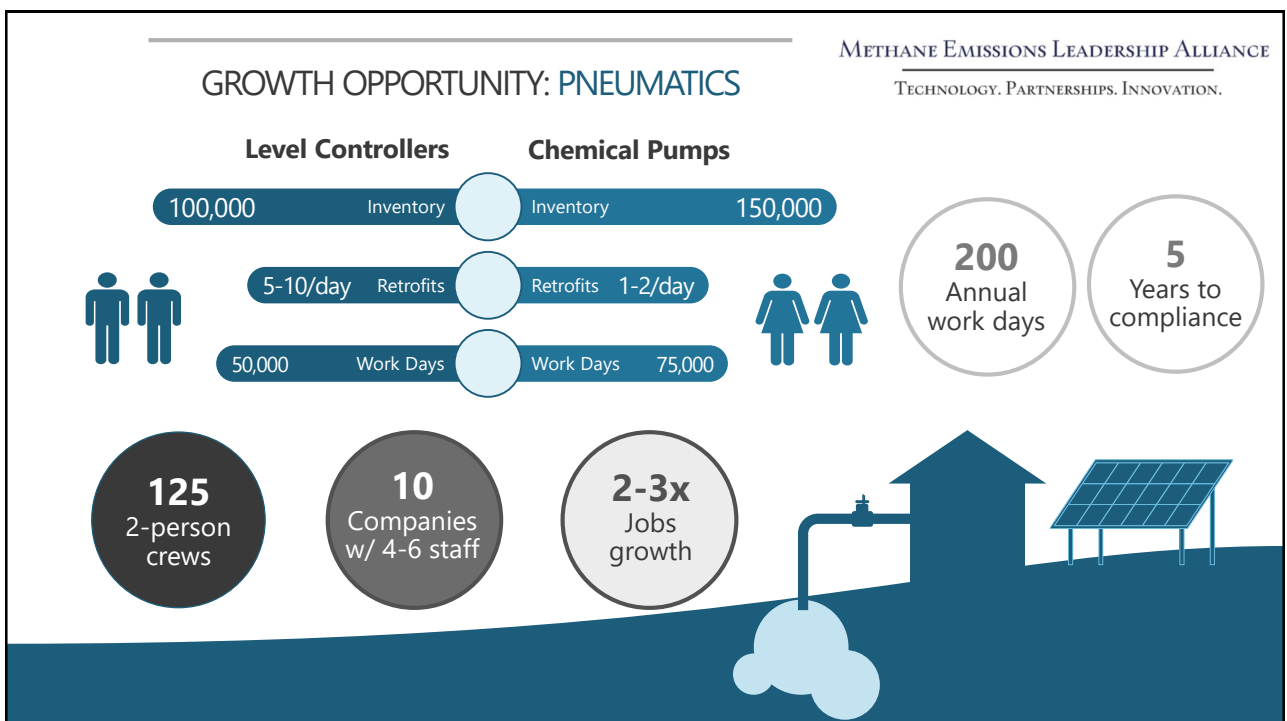
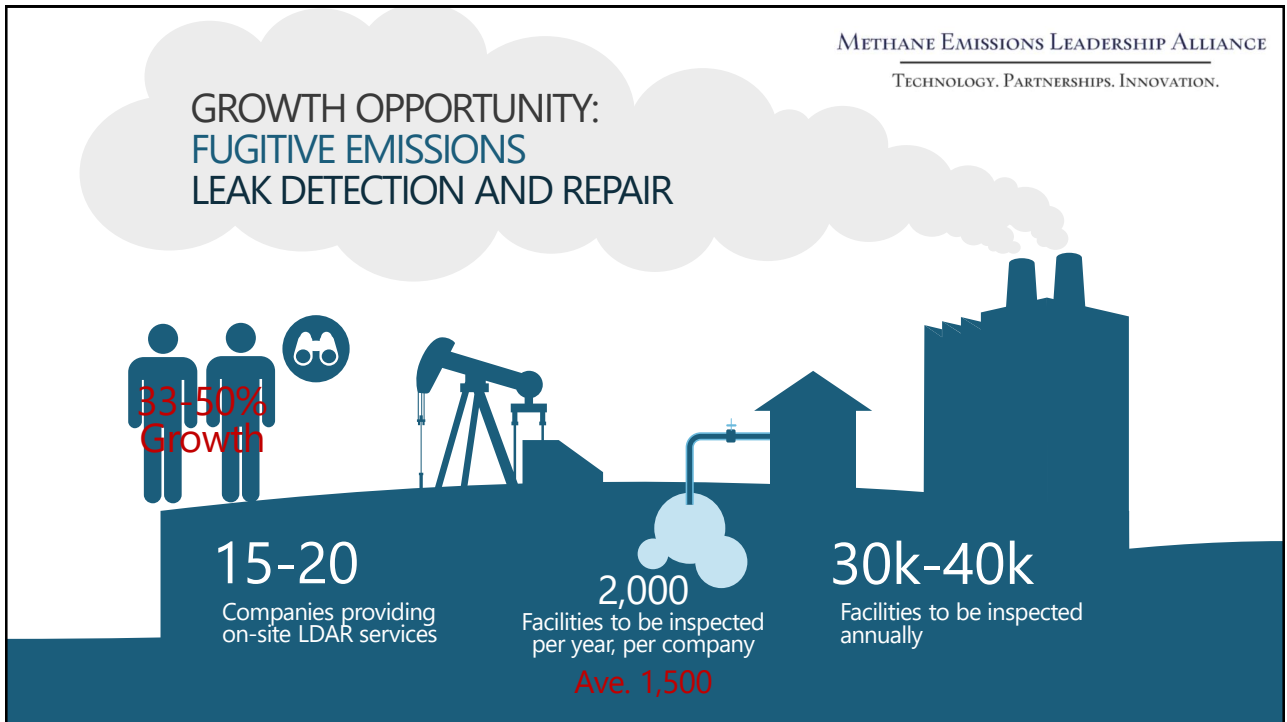
Age Group	Percentage
0	12%
1-5	47%
6-10	8%
11-15	8%
16-20	10%
21-30	0%
31-40	2%
41-50	4%
Unknown	8%

Age Group	Percentage	Count
0%	6 / 12%	6
1-49%	11 / 22%	11
50-99%	8 / 16%	8
100-149%	5 / 10%	5
150-199%	3 / 6%	3
200-299%	6 / 12%	6
300%+	6 / 12%	6
Unknown	4 / 8%	4

METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

Source Category	Coming Into Force	Considerations
Fugitives: Equipment Leaks	2020	Frequency of Inspection: 3 times per year
Venting	2023	Maximum allowable venting limit: 250 m3 / month
Pneumatic Devices	2023	Reduction Method: Conservation or destruction or replacement with non-emitting/low-bleed
Compressors	2020	Limit: 0.17 m3/minute for centrifugal compressors; 0.023 m3/minute per rod packing for reciprocating compressors





Canadian Methane Jobs Market Analysis

METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

PHASE 2

- (1) Expand search of total companies (174+)
- (2) Complete survey research (60+)
- (3) Complete list of providers by source category
- (4) Interactive map

Click the points for more about the companies or use the dropdown menu to filter the displayed points. Click reset to clear filters and return all points to the map.



METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

Source:
<https://www.edf.org/energy/us-methane-mitigation-industry-map>

METHANE EMISSIONS LEADERSHIP ALLIANCE
TECHNOLOGY. PARTNERSHIPS. INNOVATION.

CONTACT MELA

EXECUTIVE DIRECTOR

Jackson Hegland

jhegland@methanealliance.ca

www.methanealliance.ca



@MELACanada