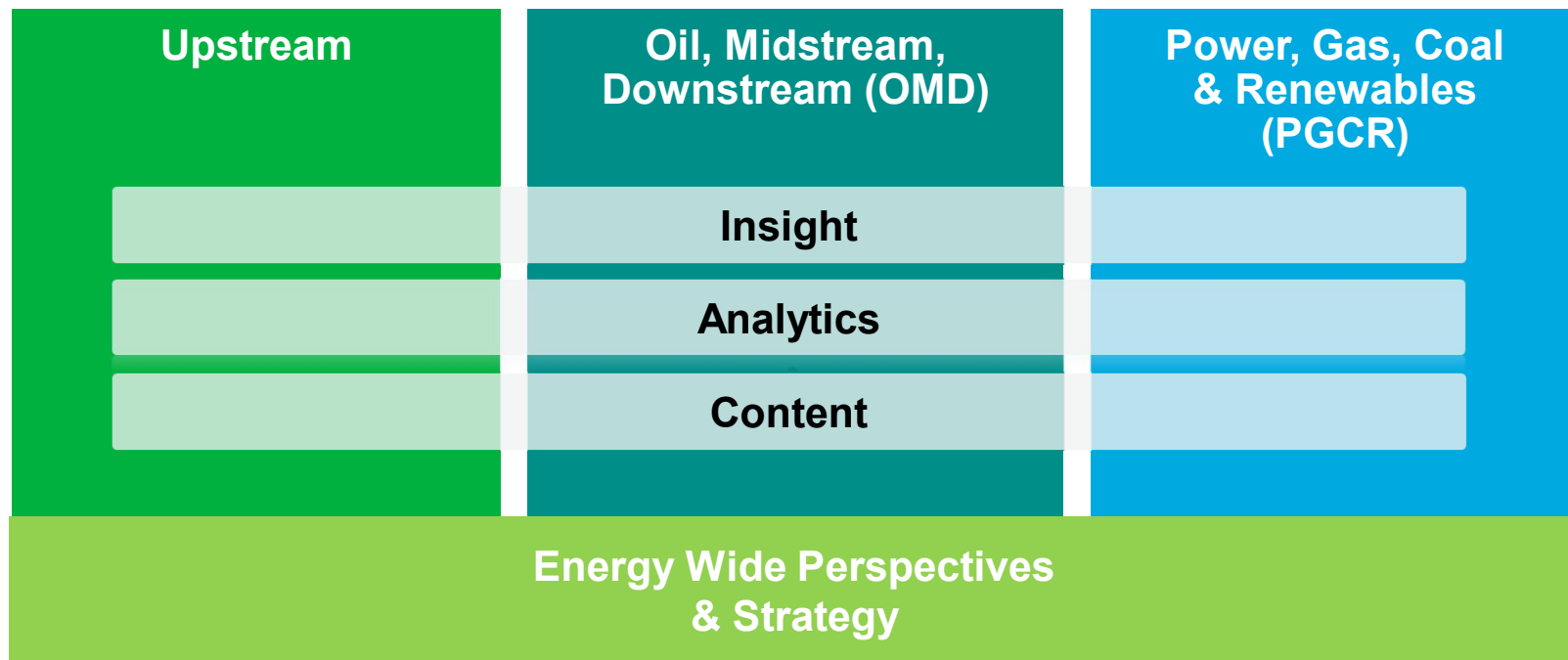




# Crude Oil Markets

## IHS Energy

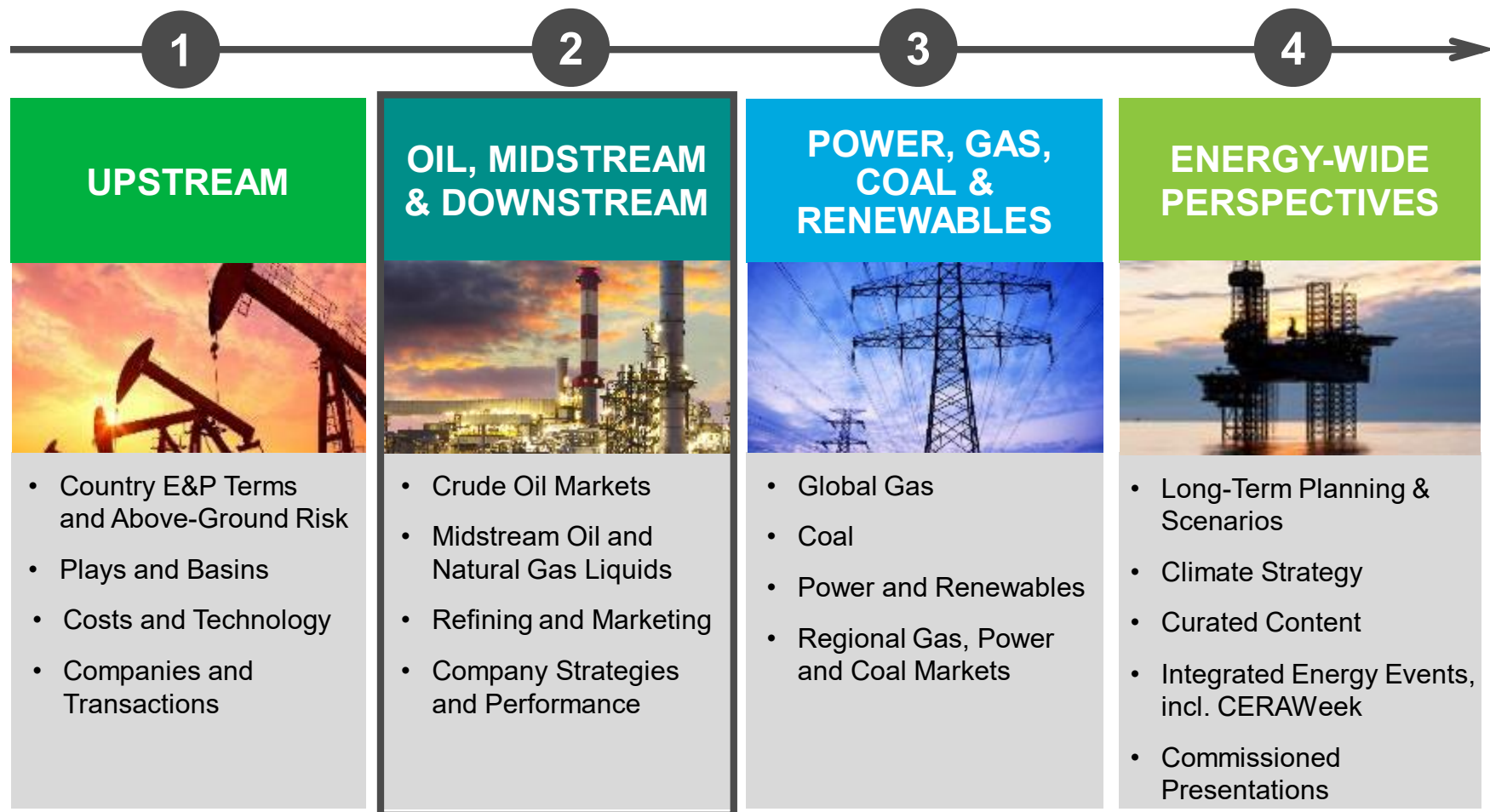
Brings together industry leading insight, analytics and content across workflows and geographies to help you make critical decisions with speed and confidence.



PLUS integrated content and analysis from across IHS Markit, Automotive, Maritime, Aerospace, Technology and Economics & Country Risk offerings.

# Harnessing IHS Energy to Support Your Business

Access the power of IHS Energy through four distinct energy segments for your online subscriptions and customer events.



## Oil, Midstream & Downstream

Assess supply, demand, trade, prices & margins for crude, NGL, LPG & refined oil products, including lubricants. Quick access to country & regional data & analysis on markets, regulations, infrastructure, refineries, & fuel retail. Benchmark operational & financial performance of leading companies and pinpoint strategies.

### Crude Oil Markets



- Prices, supply / demand, infrastructure & economics
- Geopolitics, OPEC strategy/behaviors, government policies & issues that impact short- & long-term oil markets
- Inter-regional trade balance

### Midstream & Natural Gas Liquids



- NGL & LPG supply, demand, trade & price/freight forecasts
- Identification of optimal feedstocks for petchem manufacturing
- A deep understanding of supply chain & infrastructure assets & systems

### Refining & Marketing

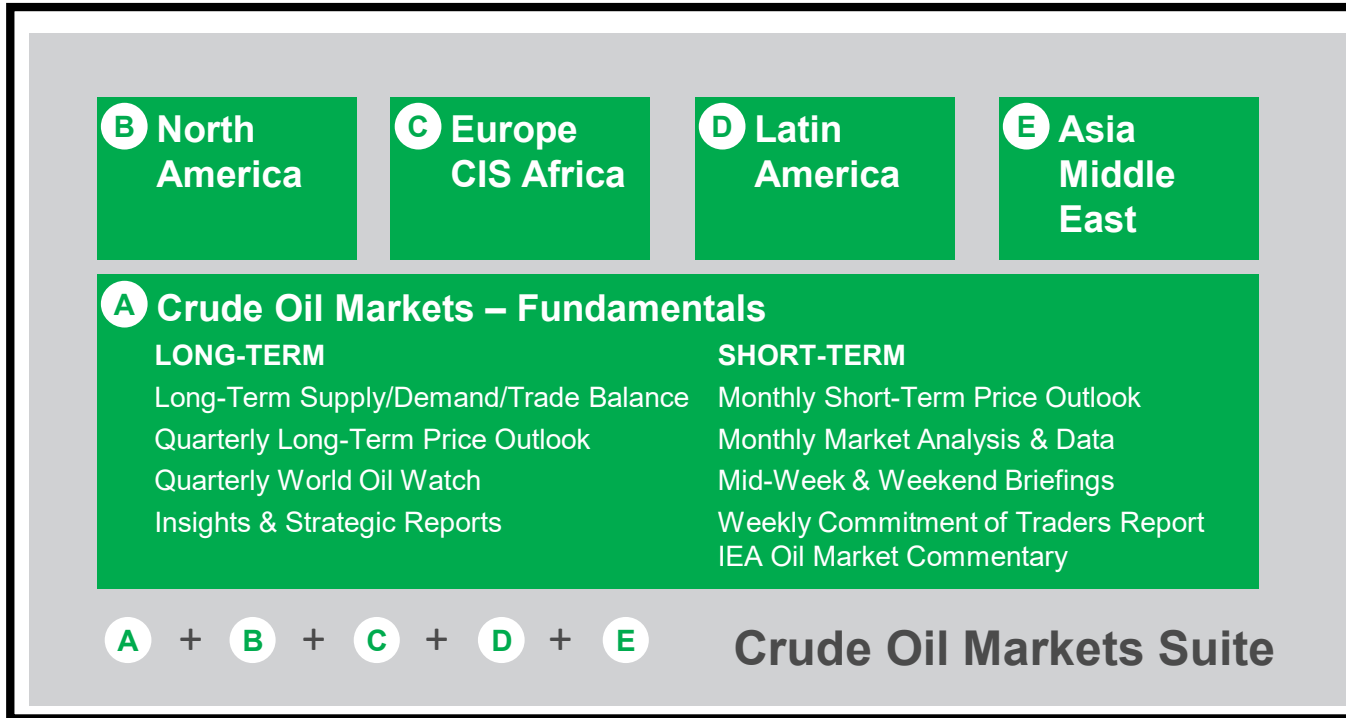


- Country demand projections for fuels
- Refinery capacity, crude & feedstock qualities, throughput & utilization
- Retail motor fuel volumes & distribution, vehicle fleet, economic overview & oil logistics
- Lubricants analysis & data

### Company Strategies & Performance



- Benchmarking for the refining & marketing businesses of major downstream operators
- Profiles & analysis to compare strategies, asset portfolios & operating metrics
- Financial performance benchmarking



**4 regional crude oil markets modules** provide exclusive analysis, short and long-term prices, supply/demand & trade forecast data

**Foundational crude oil markets coverage** (both short- and long-term) on prices, supply/demand

**Canadian Oil Sands Dialogue**  
Independent view on oil sands development that engages with key stakeholders through custom workshops & peer-reviewed special reports

**Focus on Canadian Oil Sands**  
Participative reports, briefings & workshops for stakeholders

**Crude Flow Model**  
Crude balances & trade flows by crude quality (Includes NGL & condensate)

**Market-oriented global planning models** used for long-term forecasting & analysis of industry trends

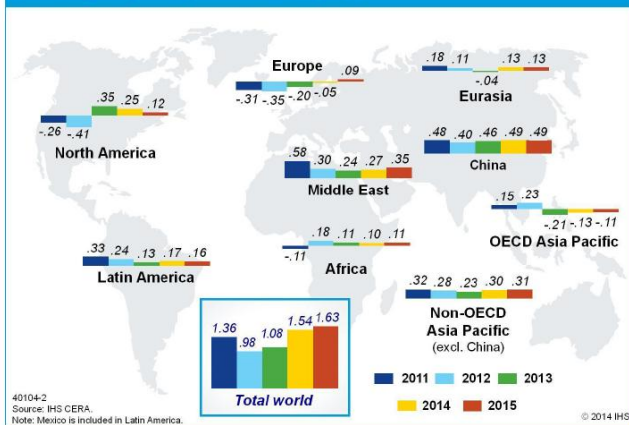
## Understand Global & Regional Crude Oil Markets

- Crude oil markets are increasingly **volatile & uncertain**, with crude prices declining dramatically since mid-2014, “recovery” level & timing unclear
- Robust supply growth driven by years of high oil prices & advances in unconventional production coupled with slowing economic growth have led to **above-normal crude stocks & much lower prices**
- OPEC’s abdication of its traditional market balancing role (in spite of recent attempts to recover it), ongoing contest for market share among key players, Iran’s full return to global crude markets & many other factors **complicate the picture**
- **How to look beyond the headlines & knee-jerk reactions?**
- Crude Oil Markets provides a **fundamentals-based** short & long-term price forecast, global/regional & country supply/demand & trade balances as well as regular analysis of ongoing energy market, macroeconomic & geopolitical trends that impact crude oil markets
- Crude Oil Markets services are built on a **world class IHS foundation**:
  - > Upstream: extensive well, production, basin/play/project database informs the **crude supply picture**
  - > Refining & Marketing: world-class data & analysis on global & regional refining, refined product & downstream value chain – **source of virtually all crude demand**
  - > Economics & Country Risk, Automotive, Chemical, Maritime on the **demand side**

## Understand Global & Regional Crude Oil Markets



Changes in oil demand by region  
(volume change from previous year in million barrels per day)



### Content and deliverables:

- 2 year monthly crude oil price outlook updated each month, 25 year annual long-term outlook updated quarterly
- Weekly, monthly & quarterly briefings on global & regional crude oil markets
- Annual strategic planning workbook: detailed long-term outlooks (25 years) for crude oil production, trade & pricing
- Critical data: crude & liquids supply & demand, inventory, OPEC production, US crude imports & differentials etc.

### Benefits and functionality:

- Answer the question: what is the future crude price track & why?
- Meets wide range of needs: time horizon, region, commodity etc.
- Understand crude oil supply & demand, globally & by region
- Make long-term E&P investment decisions
- Assess effects of economic, geopolitical & policy developments in price setting
- Anticipate critical turning points in the crude oil markets

## Crude Oil Markets 2016-17 Enhancements

- Short-term analysis & forecasting: more detailed, monthly [Short-Term Outlook](#) presentation supplemented with strengthened quarterly [World Oil Watch](#)
- [Commitment of Traders Report](#): weekly insight into financial & trading positions in crude & selected refined products
- [Crude Oil Markets Annual Strategic Workbook](#): enhanced insight, analysis & deeper data including:
  - > Future OPEC & non-OPEC upstream projects informing crude supply forecast
  - > Added medium sweet & medium sour to crude quality slate
  - > Future production broken out by base, sanctioned, unsanctioned, yet to find, tight oil, onshore vs. offshore etc.
- [Quarterly long-term price & margin forecast webinars](#): latest crude & refined product prices & margins outlook, market fundamentals & developing issues
- Added [China Crude Oil Market Report](#) to Asia/Middle East module
- Added new monthly [India Crude Oil Markets Short-Term Outlook](#) to Asia/Middle East module
- [North America Crude Oil Markets](#) coverage enhanced:
  - > More in-depth discussion of pricing trends & production outlooks for several US & Canadian crudes
  - > In-depth coverage of crude import & export trends, added North America crude trade data to data visualization
  - > [Canadian Fundamentals Data](#) underwent a detailed oil sands outlook review, incorporated Canadian oil sands capital investment outlook
- [Crude Oil Markets Tableau Dashboard](#)\* data visualization tool for Annual Strategic Workbook data such as production, crude streams, crude qualities etc., along with quarterly long-term price forecasts
- Coverage of key crude oil markets topics such as:
  - > [OPEC](#)
  - > [North American crude production](#)
  - > [Crude production cost curve & shifting economics of global supply](#)

*\*Entitled only to Crude Oil Markets Suite customers*



# Crude Oil Markets Service Deliverables

Fundamentals

Asia/Middle East

Europe/CIS/Africa

Latin America

North America

|                                | Report deliverables   | Frequency | Description   | Location on Connect   |
|--------------------------------|---|-----------|---|---|
| Crude Oil Markets All Modules  | Periodic Reports & Presentation Files                                   | Periodic  | Periodic reports offering insight on key business trends & critical issues, focusing on long-term implications, posted to Fundamentals and/or regional Crude Oil Markets modules as applicable. Presentations from various IHS Energy meetings, conferences & webinars.   | Capability Page: Crude Oil Markets<br>Tab: Oil Perspectives, Oil Sands Dialogue & Webinars & Events |
| Crude Oil Markets Fundamentals | Commitment of Traders Report  | Weekly    | Weekly insight into financial & trading positions in crude, selected refined products & natural gas   | Capability Page: Crude Oil Markets<br>Tab: Oil Market Indicators                                    |
|                                | US EIA Weekly Commentary  | Weekly    | Analysis of Energy Information Administration (EIA) statistics published weekly, typically on Wednesdays. Contains dashboard of weekly oil market statistics, supplemented with IHS observations & forward looking analysis.  | Capability Page: Crude Oil Markets<br>Tab: Oil Market Indicators                                    |
|                                | Oil Market Briefing   | Weekly    | End of week report highlighting issues likely to be important to crude oil markets over the next two weeks, with a view on price direction. Keeps clients abreast of short-term upcoming issues.  | Capability Page: Crude Oil Markets<br>Tab: Oil Market Indicators                                    |
|                                | Crude Oil Markets Fundamentals (Global) Short-Term Outlook              | Monthly   | A concise presentation summarizing our latest global crude oil markets messages. Delivered with and supplements Outlook For Global Crude Oil Prices & Outlook for Oil Market Fundamentals data files.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook                                       |
|                                | IEA Oil Market Report Commentary  | Monthly   | Monthly analysis comparing IHS Energy's supply demand expectations against the International Energy Agency's (IEA) outlook; provides a simple method to set IHS forecasts in context.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook                                       |
|                                | Saudi Aramco Official Sales Price Commentary                            | Monthly   | Analysis of Saudi Aramco Official Sales Prices (OSP) by enclave to show the relative changes within and between regions.  | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook                                       |
|                                | World Oil Watch   | Quarterly | Quarterly flagship report that anticipates short- to medium-term developments and trends in the world oil market. Delivered with & supplements World Oil Watch data file.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook                                       |
|                                | Crude Oil Markets Fundamentals (Global) Long-Term Outlook               | Quarterly | Presentation explicating our long-term crude price outlook, updated quarterly, including identifying key changes from our previous view. Delivered with and supplements Crude Oil Markets Fundamentals (Global) Long Term Outlook data file. (Same presentation, Long-Term Price & Margin Outlook delivered with all COM & R&M regional long-term price updates). | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook  |
|                                | Crude Oil Markets Fundamentals (Global) Annual Strategic Workbook (ASW) | Annual    | Presentation offers detailed analysis of the long-term outlook for global crude oil production (delivered with & supplements Crude Oil Markets Fundamentals (Global) ASW data files).   | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook  |

|                                | Data deliverables   | Frequency | Description   | Location on Connect  |
|--------------------------------|---|-----------|---|--|
| Crude Oil Markets Fundamentals | IHS Energy Outlook for Global Crude Oil Prices  | Monthly   | Short-term outlook for global benchmark crude prices (monthly & quarterly for next 1.5 to 2.5 years), updated monthly. Delivered with & supplements Short-Term Outlook slides & Outlook for Oil Market Fundamentals data files..  | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil |
|                                | Crude Oil Markets Fundamentals Outlook for Oil Market Fundamentals  | Monthly   | Global liquids demand-supply balance by region (monthly & quarterly for next 1.5 to 2.5 years, and Annual to 2040); and global oil consumption and production outlooks by country, both non-OPEC and OPEC (monthly, quarterly & annual for next 1.5 to 2.5 years). Delivered with & supplements Short-Term Outlook slides & Outlook For Global Crude Oil Prices data files.                     | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil |
|                                | OPEC Oil Production Data  | Monthly   | Estimate of OPEC crude production by country from most recent month, and prior months & quarters.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook  |
|                                | IHS Energy Economic Growth Outlook  | Monthly   | Latest regional and global economic growth assessment from IHS Economics.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook  |
|                                | World Oil Watch   | Quarterly | Quarterly flagship report that anticipates short- to medium-term developments and trends in the world oil market. Delivered with & supplements World Oil Watch written report.  | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook  |
|                                | Crude Oil Markets Fundamentals (Global) Long-Term Outlook   | Quarterly | Outlook for global benchmark crude prices (annual through 2040), updated quarterly. Delivered with & supplements Long-Term Price & Margin Outlook slides).  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |
|                                | Crude Oil Markets Long-Term Forecast: Tableau (Note: this deliverable entitled only to Crude Oil Markets Suite customers)   | Quarterly | Interactive dashboard contains long-term regional and country level forecasts of crude oil and segregated condensate production, global trade and pricing to 2040. Crude price forecasts updated quarterly, production, trade etc. updated Annual.  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook   |
|                                | Crude Oil Markets Fundamentals (Global) Annual Strategic Workbook Summary Tables  | Annual    | Detailed outlook to 2040 of global production of crude oil, segregated condensate, and total liquids; and of OPEC production capacity. Associated Excel tables and PowerPoint slides provide detailed country-level views of crude oil supply for major producers by year out to 2040. Delivered with and supplements Crude Oil Markets Fundamentals (Global) Annual Strategic Workbook slides. | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |
|                                | Crude Oil Markets Fundamentals (Global) Annual Strategic Workbook Crude Oil & Condensate Trade (Note: deliverable entitled only to COM Fundamentals + at least one regional module subscribers) | Annual    | Region-to-region trade matrices for each of the four crude oil quality classifications in addition to trade outlooks that focus on the flow of export-oriented crude oil streams to the major world regions to 2040. Supplements ASW presentation slides. Entitled only to COM Fundamentals + at least one regional module subscribers.   | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |

|                           | Report deliverables  | Frequency | Description  | Location on Connect   |
|---------------------------|--|-----------|--|---|
| Asia/ME Crude Oil Markets | Asia/Middle East Crude Oil Markets Short-Term Outlook              | Monthly   | Presentation offers latest messages & outlooks for Asia/Middle East crude oil markets including short-term prices and other key metrics. Includes key changes to IHS view from previous month. Delivered with and supplements Asia/ME Crude Oil Markets Short-Term Outlook data file.  | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook |
|                           | China Crude Oil Market Report                                      | Monthly   | Concise monthly overview of the Chinese crude oil market. Delivered with & supplements China Crude Oil Market Report data file.  | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook |
|                           | India Crude Oil Markets Short Term-Outlook                         | Monthly   | Concise monthly overview of the Indian crude oil market.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook |
|                           | Asia/Middle East Crude Oil Markets Long-Term Price Outlook         | Quarterly | Presentation offers latest messages & outlooks for long-term prices, differentials & margins, including key changes to IHS view from previous quarter. Delivered with and supplements Asia/ME Crude Oil Markets Long-Term Outlook data file. (Same presentation, Long-Term Price & Margin Outlook, delivered with all COM & R&M regional long-term price updates). | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook  |
|                           | Asia/Middle East Crude Oil Markets Annual Strategic Workbook (ASW) | Annual    | Presentation offers a detailed analysis of Asia/Middle East production of crude oil (including breakouts by key crude oil types), segregated condensate and total liquids. Delivered with and supplements ASW data files.  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook  |

|                                  | <b>Data deliverables</b>                                     | <b>Frequency</b> | <b>Description</b>  | <b>Location on Connect</b>   |
|----------------------------------|--|------------------|---|--|
| <b>Asia/ME Crude Oil Markets</b> | Asia/Middle East Crude Oil Markets Short-Term Outlook        | Monthly          | Monthly & quarterly Asia/Middle East crude oil price 1.5 to 2.5 year outlook updated monthly (Delivered with & supplements by Asia/ME Crude Oil Markets Short-Term Outlook slides).   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil |
|                                  | China Crude Oil Market Report                                | Monthly          | Concise monthly overview of the Chinese crude oil market. Delivered with & supplements China Crude Oil Market Report presentation slides.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook  |
|                                  | Asia/Middle East Crude Oil Markets Long-Term Price Outlook   | Quarterly        | Asia/Middle East crude oil price (annual basis), outlook 25+ years into future, updated quarterly. Delivered with global Outlook for Prices & Margins slides.   | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |
|                                  | Asia/Middle East Crude Oil Markets Annual Strategic Workbook | Annual           | Strategic planning workbook presents a detailed analysis of Asia/Middle East production of crude oil (including breakouts by key crude oil types), segregated condensate and total liquids. Delivered with & supplements Asia/ME Crude Oil Markets ASW presentation slides. | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |

|   | Report deliverables  | Frequency | Description   | Location on Connect   |
|---|--|-----------|---|---|
| Europe/<br>CIS/Africa<br>Crude Oil<br>Markets | Europe/CIS/Africa<br>Crude Oil Markets<br>Short-Term Outlook                 | Monthly   | Presentation offers latest messages & outlooks for Europe/CIS/Africa crude oil markets including monthly & quarterly prices and differentials for major regional crudes. Includes key changes to IHS view from previous month. Delivered with and supplements Eur/CIS/Africa Crude Oil Markets Short-Term Outlook data file.  | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook |
|   | Europe/CIS/Africa<br>Crude Oil Markets<br>Long-Term Outlook                  | Quarterly | Presentation offers latest messages & outlooks for annual prices, differentials and other key metrics, including key changes to IHS view from previous quarter. Delivered with and supplements Europe/CIS/Africa Crude Oil Markets Long-Term Outlook data file. (Same presentation, Long-Term Price & Margin Outlook, delivered with all COM & R&M regional long-term price updates). | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook  |
|   | Europe/CIS/Africa<br>Crude Oil Markets<br>Annual Strategic<br>Workbook (ASW) | Annual    | Presentation offers detailed analysis of Europe/CIS/Africa production of crude oil, including breakouts by crude oil types, segregated condensate & total liquids, plus regional trade flows. Delivered with and supplements ASW data files.  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook  |

|   | <b>Data deliverables</b>   | <b>Frequency</b> | <b>Description</b>  | <b>Location on Connect</b>   |
|---|--|------------------|---|--|
| <b>Europe/<br/>CIS/Africa<br/>Crude Oil<br/>Markets</b> | Europe/CIS/Africa<br>Crude Oil Markets<br>Short-Term Outlook           | Monthly          | Monthly & quarterly outlook, for up to two years, for major Europe/CIS/Africa crude oil prices and differentials. Delivered with and supplements Europe/CIS/Africa Crude Oil Markets Short-Term Outlook slides.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil |
|   | Europe/CIS/Africa<br>Crude Oil Markets<br>Long-Term Outlook            | Quarterly        | Annual outlook, for ~25 years, for major Europe/CIS/Africa crude oil prices and differentials. Delivered with and supplements Outlook for Prices & Margins presentation.  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |
|   | Europe/CIS/Africa<br>Crude Oil Markets<br>Annual Strategic<br>Workbook | Annual           | Detailed analysis of Europe/CIS/Africa production of crude oil, including breakouts by crude oil types, segregated condensate and total liquids, plus regional crude oil trade flows. Delivered with and supplements Europe/CIS/Africa Crude Oil Markets ASW presentation slides. | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |

|  | <b>Report deliverables</b>                                      | <b>Frequency</b> | <b>Description</b>   | <b>Location on Connect</b>                                      |
|--|---|------------------|--|---|
| <b>Latin America Crude Oil Markets</b> | Latin America Crude Oil Markets Long-Term Outlook               | Quarterly        | Presentation offers latest messages & outlooks for long-term prices, differentials & margins, including key changes to IHS view from previous quarter. Delivered with & supplements Latin America Crude Oil Markets Long-Term Outlook data file. (Same presentation, Long-Term Price & Margin Outlook, delivered with all COM & R&M regional long-term price updates). | Capability Page:<br>Crude Oil Markets<br>Tab: Long-Term Outlook |
|  | Latin America Crude Oil Markets Annual Strategic Workbook (ASW) | Annual           | Presentation offers detailed analysis of the long-term outlook for Latin America production of crude oil (including breakouts by key crude oil types), segregated condensate and total liquids. Delivered with and supplements ASW data files.   | Capability Page:<br>Crude Oil Markets<br>Tab: Long-Term Outlook |



|                                 | Data deliverables   | Frequency | Description  | Location on Connect  |
|---------------------------------|---|-----------|--|--|
| Latin America Crude Oil Markets | Latin America Crude Oil Markets Long-Term Outlook         | Quarterly | Latin America crude oil price (annual basis), outlook 25+ years into future, updated quarterly. Delivered with and supplements global Outlook for Prices & Margins slides.   | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary<br>Tools/Analytics & Charts: OMD Data Browser, Crude Oil |
|                                 | Latin America Crude Oil Markets Annual Strategic Workbook | Annual    | Strategic planning workbook presents a detailed analysis of Latin America production of crude oil (including breakouts by key crude oil types), segregated condensate and total liquids. Delivered with and supplements Latin America Crude Oil Markets ASW presentation slides. | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary<br>Tools/Analytics & Charts: OMD Data Browser, Crude Oil |

|                                 | Report deliverables   | Frequency | Description  | Location on Connect  |
|---------------------------------|---|-----------|--|--|
| North America Crude Oil Markets | North America Crude Oil Markets Crude Price Differentials Tracker | Weekly    | A short data-rich market report every Monday to provide clients with a frame of reference for the changes in these spreads, along with a short analysis explaining both current and future changes in these price relationships, based on refinery maintenance, expanded pipeline or rail capacity, as well as production growth.  | Capability Page: Crude Oil Markets<br>Tab: Oil Market Indicators |
|                                 | North America Crude Oil Markets Short-Term Outlook                | Monthly   | Presentation offers latest messages & outlooks for short-term prices, price parity, inventory, demand & run rates, imports, infrastructure etc. Includes key changes to IHS view from previous month. Delivered with & supplements North America Crude Oil Markets Short-Term Outlook data file.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook    |
|                                 | North America Crude Oil Markets Long-Term Outlook                 | Quarterly | Presentation offers latest messages & outlooks for long-term prices, differentials & margins, including key changes to IHS view from previous quarter. Delivered with & supplements North America Crude Oil Markets Long-Term Outlook data file, also supplements North America Crude Oil Markets Canadian Fundamentals data file. (Same presentation, Long-Term Price & Margin Outlook, delivered with all COM & R&M regional long-term price updates). | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook     |
|                                 | North America Crude Oil Markets Annual Strategic Workbook (ASW)   | Annual    | Presentation offers detailed analysis of the long-term outlook for North American oil markets, including production, supply, refinery runs, and flows. Delivered with and supplements COM North America ASW & Canadian Fundamentals data files.  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook     |

|                                       | Data deliverables   | Frequency | Description   | Location on Connect  |
|---------------------------------------|---|-----------|---|--|
| North America<br>Crude Oil<br>Markets | North America<br>Crude Oil Markets<br>Short-Term Outlook            | Monthly   | Monthly & quarterly North America (U.S. & Canada) crude oil price 1.5 to 2.5 year outlook updated monthly. Delivered with & supplements by North America Crude Oil Markets Short-Term Outlook slides.   | Capability Page: Crude Oil Markets<br>Tab: Short-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil |
|                                       | North America<br>Crude Oil Markets<br>Long-Term Outlook             | Quarterly | North America crude oil price (annual basis), Northern Tier crude delivery, U.S. Midwest refining margins and synbit/dilbit economics outlook 25+ years into future, updated quarterly. Delivered with and supplements Outlook for Prices & Margins presentation slides.  | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |
|                                       | North America<br>Crude Oil Markets<br>Canadian<br>Fundamentals Data | Quarterly | Provides detailed Canadian crude oil production and supply data, as well as oil sands fundamentals including labor, capital cost indexes and breakeven economics. This dataset contains outlooks through 2040. Supplements Outlook for Prices & Margins presentation slides. First quarter update every year incorporated into the COM North America ASW.   | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook   |
|                                       | North America<br>Crude Oil Markets<br>Annual Strategic<br>Workbook  | Annual    | North American data file provides detailed regional crude oil production and flows to 2040. The Canadian data file provides detailed Canadian crude oil production and flows, as well as oil sands fundamentals including production, labor, capital cost indexes, and breakeven economics. Delivered with & supplements North America Crude Oil Markets ASW presentation slides & North America Crude Oil Markets Canadian Fundamentals data file. | Capability Page: Crude Oil Markets<br>Tab: Long-Term Outlook<br>Primary Tools/Analytics & Charts: OMD Data Browser, Crude Oil  |