**GLOBAL**

- **-9%** Expected drop in global energy GDP in Q2 2020
- **$1.5T** Increase in global debt capital markets in H1 2020 year-on-year
- **-16%** Drop in global consumer confidence YTD

**FINANCIALS**

- **+5%** Price increase of EU carbon allowance futures contracts YTD
- **200K** US Small & Medium Enterprises face long-term viability risks in 2020

**OPERATIONS**

- **Production Cuts**
  - August 2020 vs December 2019
  - **-11M bpd**
  - **-11%**
  - **-33%**

- **Demand Drop**
  - August 2020 vs December 2019
  - **-7M bpd**
  - **-7%**
  - **-19%**

**FINANCIALS**

- **↑ +10%** Oil Price
- **↑ +7%** Market Cap
- **↑ +4%** CAPEX
- **-21%** Price drop of Brent 12-month futures contracts YTD
- **-56%** Market cap drop based on +100 public companies YTD
- **$146B** Capex cuts announced by +240 Oil & Gas companies for 2020
- **-45%** Year-over-year drop in O&G companies revenues based on Q2

**DEBT BURDEN**

- **0.7** Increase in debt-to-equity ratio from Q2 2019 to Q2 2020

**Note:** (*) Others include Eurasia (i.e. former URSS) and other OECD and Non-OECD countries

**Upstream**

- **171** # of projects delayed/canceled
- **3.1M** bpd equivalent

**Midstream**

- **49** # of projects delayed/canceled
- **14.9** Thousand km of pipelines equivalent

**Downstream**

- **128** # of projects delayed/canceled
- **6.9M** Refining throughout fall in 2020 YoY in bpd

**Inventories**

- **-16%** Decrease in floating storage of crude oil in July
- **4M bpd** Expected stock draw in H2 2020

**Job Losses**

- **1.2M** Expected job losses in upstream operations
- **-150K** Permanent job losses expected in top 50 OFSE firms in 2020

**Bankruptcies**

- **50** US E&P & OFSE companies filed for bankruptcy
- **170** US E&P bankruptcies by end 2021 in a $30 oil environment

Sources: (1) Accenture (2) Thomson Reuters as of August 12th (3) Global Data (4) Accenture analysis based on +75 companies results, Thomson Reuters (5) EIA (6) IEA (7) Rystad (8) Haynes and Boone, Capital IQ. Note: (*) Others include Eurasia (i.e. former URSS) and other OECD & Non-OECD countries