

PLATTS AFRICAN REFINING

Inaugural

SUMMIT

November 17-18, 2014, Cape Town, South Africa

Speakers
confirmed include:



Ekpen Omonbude
Economic Adviser
Commonwealth Secretariat



George Nicolaides
Operations Director, Petroleum Refining,
Dangote Industries



Dr. Victor Adeniran
General Manager, Crude Oil Commercial, Gas
Business & Commercial
**TOTAL Upstream Companies
in Nigeria**



Muzi Mkhize
Chief Director: Hydrocarbons
Department of Energy, South Africa



Dr. Ahmed Kandil
Head of Energy Studies Program
**AI-Ahram Center for Political and
Strategic Studies AI-Ahram Foundation**

Exchanging value
in the oil markets

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FOR THE REGION**

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Inaugural **SUMMIT**

November 17-18, 2014, Cape Town, South Africa

Why attend?

- **Explore** the state of play of African refining and their challenges today
- **Examine** the social and economic benefits the African refining industry contributes to nations compared to import terminal operations
- **Find out** the source and destination of African crude oil and markets for products
- **Discover** what are the latest opportunities and investment potential in Kenya, South Africa, Nigeria, Libya and Egypt
- **Investigate** refined products trading, pricing and risk developments
- **Debate** what can be done to overcome logistics and storage challenges in Africa
- **Assess** the challenges faced by investors in financing new investments
- **Understand** Platts price assessment methodology
- **Learn** refining lessons from abroad – Europe, Americas, Middle East and Asia
- **Dissect** opportunities to sell products in each region of Africa for overseas players
- **Gain** insight into the regional similarities and differences of oil refining in Africa



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Simon Kears

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DAY 1 MONDAY, NOVEMBER 17, 2014

08:00 Registration and continental breakfast
(available to sponsor)

08:50 Chairman's welcoming remarks
David M. Sineke, Oil Industry Researcher and Analyst, **Engen**

Session 1: The big picture

09:00 SETTING THE SCENE

Exploring the state of play of African refining and their challenges today

- ▶ What are the capacity and demand projections compared to other regions and who are the new players in the market?
- ▶ How much is African refinery output forecast to grow and is it sufficient to meet demand growth?
- ▶ What percentage of refined products will be imported and exported in future and why, and which barrels will be determining demand growth?
- ▶ Exploring the shortfall in clean products in Africa and its implications on import levels in future
- ▶ Despite announcements to the contrary over many years, why have so few refineries been built or expanded?
- ▶ How African governments have to evaluate refining against their alternative investments, such as healthcare, education, infrastructure, power generation and minerals

Ekpen Omonbude, Economic Adviser,
Commonwealth Secretariat



09:25 Examining the social and economic benefits the African refining industry contributes to nations compared to import terminal operations

- ▶ Are the economic benefits of fuels import terminals greater than those provided by some of the more challenged African refineries?
- ▶ How tightening environmental legislation and mandated investments would bring considerable health benefits, but risk losing the socioeconomic benefits of refining
- ▶ Evaluating whether government support for refineries represents an attractive solution for nations

David M. Sineke, Oil Industry Researcher and Analyst, **Engen**

09:50 Find out the source and destination of African crude oil and markets for products

- ▶ What alternatives are there to crude and how effective are they?
- Dolapo Oni, Energy Research Analyst, Sub Sahara (exc South Africa),
Ecobank Development Corporation

10:15 Networking and refreshment break
(available to sponsor)

Session 2: Country case study focuses

Leader perspectives: Latest developments, opportunities and investment potential in:

10:45 Nigeria
Dr. Victor Adeniran, General Manager, Crude Oil Commercial, Gas Business & Commercial,
TOTAL Upstream Companies in Nigeria



11:05 South Africa
Muzi Mkhize, Chief Director, Hydrocarbons,
Department of Energy (South Africa)



11:25 Kenya
Peter Ntephe, President/CEO, **ERHC Energy**



11:45 Egypt
Dr. Ahmed Kandil, Head of Energy Studies Program, Al-Ahram Center for Political and Strategic Studies,
Al-Ahram Foundation



12:05 Libya
Dr. Mohamed Karbal, Attorney at Law New York, Libya and Dubai, Managing Partner, **KARBAL & CO**

12:25 Mauritania
El Hadarmy Mohamed M'Bareck, Director,
Ministry of Petroleum Energy and Mines, Mauritania

12:45 Q&A consisting of the above speakers

13:10 Networking Lunch
(available to sponsor)

Session 3: Platts pricing benchmarks

14:40 Platts price assessment methodology explained

- ▶ Why are pricing benchmarks so important?
- ▶ How do I manage risk and monitor the performance of oil?
- ▶ What's the importance of the Market-on-Close (MOC) principle in Platts oil price discovery process?
- ▶ How do I understand and follow price developments across the oil supply chain?
- ▶ What are the key pricing trends for the physical and derivatives oil market?

Olivier Lejeune, Team leader, Europe & Africa Oil, **Platts**

Session 4: Examining trading, pricing & risk

15:05 PANEL DISCUSSION

Investigating refined products trading, pricing and risk developments

- ▶ Overview of global pricing and product flows
- ▶ How are retail prices determined in Africa?
- ▶ How entry of global traders in retailing will increase pressures for local refiners
- ▶ How local marketers will be competitive due to contacts, lower costs and standards, and higher risk appetite
- ▶ What will multi-country marketers do to build brand differentiation and increased controls over local management?
- ▶ Investigating how traders are expanding their operations towards downstream by acquiring international oil companies interests and how this is changing the competitive landscape
- ▶ What impact has the tax change on gasoline in Nigeria had?

Abba Isa Abubakar, Trader, **MRS Holdings**

Yomi Benson, Product Trader, **Sahara Energy**

Londi Hlela, Chief Executive Officer, **Nooa Petroleum**

Gabriel Ogbechie, Managing Director, **Rainoil**

Moderator: Nwulu Chioma, Enterprise Risk Management, **Aiteo Group**

15:45 Networking and refreshment break (available to sponsor)

Session 5: Logistics & storage strategies

16:15 PANEL DISCUSSION

To what extent is African logistics infrastructure saturated, aged and operating at maximum capacity – what can be done to overcome this?

- ▶ Evaluating how to increase shipping and port capacity across Africa
- ▶ Exploring the current state of play of railways
- ▶ What can be done to encourage investment in sustainable, efficient and profitable logistics infrastructures?

Londi Hlela, Chief Executive Officer, **Nooa Petroleum**

Chris Matchett, Snr. Manager, **Transnet Port Authority**

Dipo Salimonu, Chief Executive Officer, **Moteriba Terminals and Logistics**

Johny Smith, Chief Executive Officer, **Walvis Bay Corridor**

Moderator: Nicolas Giovanna, Managing Director, **Tune Product Tankers**

16:55 Outlining storage regionally in Africa: how much is sufficient and well-linked storage key to security of supply and competitive pricing?

- ▶ What markets have insufficient storage and saturated pipelines?
- ▶ Examining how to effectively finance and invest in tank storage facilities across Africa – what market locations will attract the most investment?
- ▶ What new storage projects and regional hubs are we seeing

Gabriel Ogbechie, Managing Director, **Rainoil**

Session 6: Future of refining in Africa and elsewhere

17:20 CLOSING KEYNOTE

The future of refineries in Africa and competing markets: fading ambition or untapped potential?

- ▶ Staying ahead of the curve in an increasingly competing market
- ▶ Identifying the top global market, regulatory and technology trends for refineries expansion and revamp projects
- ▶ Africa's refining ambitions, where might the industry go?

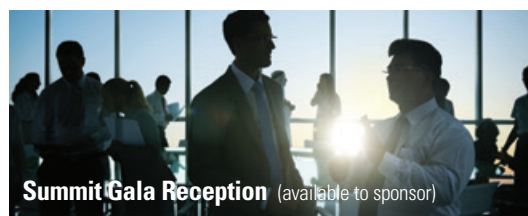
George Nicolaides, Operations Director, Petroleum Refining, **Dangote Industries**



17:45 Chairman's concluding remarks

David M. Sineke, Oil Industry Researcher and Analyst, **Engen**

17:55



Summit Gala Reception (available to sponsor)

DAY 2 TUESDAY, NOVEMBER 18, 2014

08:00 Registration and continental breakfast (available to sponsor)

09:30 Chairman's review of day one

David M. Sineke, Oil Industry Researcher and Analyst, **Engen**

Session 7: Overseas lessons, opportunities & regional differences

Lessons from abroad – exploring refining in Europe, Americas, Middle East and Asia

09:40 Toril Bosoni, Senior Oil Market Analyst - Refining, International Energy Agency (IEA)



10:05 Gerrit Polhaar, Technology Marketing Area Manager - Middle East & Africa, Chevron Lummus Global LLC

10:30 African downstream challenges from the North, East and West

- ▶ Targeted growth market for international downstream players
 - 9- Outlook: African demand, supply & balances
- ▶ Evolving competition from outside the region
 - Impacts on African downstream
 - Regional trade flows
 - Special focus on competition from Europe, US, ME and Asia

Dr. Constantin Weinstabl, Energy Analyst and Team Leader Business Development, **JBC Energy**



GROUP DISCOUNTS AVAILABLE

10:55 Exploring the similarities and differences between the various regions of Africa in oil refining

- ▶ How East Africa is entirely dependent on clean product imports
Karl Nietvelt, Senior Director, Analytical Manager, Metals & Mining/Chemicals, **Standard and Poor's**

11:20 Networking and refreshment break (available to sponsor)

Session 8: Financing developments

11:50 PANEL DISCUSSION

Investigating the challenges faced by investors in financing new investments

- ▶ Why local governments have to ascertain the right regulation to encourage investment
- ▶ How can refiners convince banks to make multi-billion dollar loans to refining projects?
- ▶ How to spearhead investment by international bank loan syndications
- ▶ What countries outside of Africa are investing in the continent and why?
- ▶ How competition for capex for refinery companies will continue internally with upstream and externally for government subsidy

Paul Eardley-Taylor, Head of Energy, Utilities and Infrastructure Coverage, Southern Africa, **Standard Bank**

Gbolahan Fasade, Director, Energy Head, **Citi**

Gueye Mahanta, Sales Director, **La Société Africaine de Raffinage (SAR)**

Dolapo Oni, Energy Research Analyst, Sub Sahara (exc South Africa), **Ecobank Development Corporation**

Moderator: Miswin Mahesh, Oil Analyst, **Barclays**

Session 9: Technology & safety improvements

12:30 Improving the economics, competitiveness and sustainability of refining through technological and safety innovation

- ▶ Managing ageing refining assets responsibly and cost effectively
- ▶ Effectively fighting corrosion in a refining environment
- ▶ Exploring lack of investment for on-going maintenance and upgrading – what can new technology do to help?

Gueye Mahanta, Sales Director,

La Société Africaine de Raffinage (SAR)

Session 10: Closing thoughts - future prospects

12:55 CHAIRMAN'S CONCLUDING REMARKS

Looking to the future – what can the African refining industry do to be more commercially driven?

- ▶ What new business models must African refineries adopt?
- ▶ What government refinery protection mechanisms could we see?
- ▶ To what extent will small capacity refineries struggle to survive?
- ▶ What successful privatization of refineries could we see in future?
- ▶ Will it be best and viable to develop large regional refining hubs or develop a larger number of smaller refineries in various countries?

David M. Sineke, Oil Industry Researcher and Analyst, **Engen**

13:20 Close of conference

UPCOMING PLATTS EVENTS in EMEA

3rd Annual Mediterranean Bunker Fuel

December 1-2, 2014 | Hotel Rey Juan Carlos, Barcelona, Spain

2nd Annual Middle East Crude Oil Summit

December 8-10, 2014 | Dubai, UAE

5th Annual Middle Distillates Conference

January 19-20, 2015 | Antwerp, Belgium

8th European Annual Oil Storage Conference

January 22-23, 2015 | Amsterdam, The Netherlands

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Venue

The Table Bay Hotel
Quay 6
Victoria & Alfred Waterfront
Cape Town, 8001
Tel: **+27 21 406 5000**



Discounted Accommodation

A limited number of rooms have been reserved for conference participants at the Table Bay Hotel, Cape Town at the preferential rates listed below. The discounted rates are for the nights of November 17 - 18, 2014 only.

Room rates

Single Luxury King Room - R3,856
Double Luxury King Room - R4,116

Reservations

To book Tel: **+27 21 406 5000** and quote "Platts" in order to receive the preferential rates.

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Simon Kears, Platts,
20 Canada Square, Canary Wharf,
London E14 5LH, UK