

5th Annual

European Petrochemicals Conference

Select and make the most out of the Olefins and Aromatics value chains

February 5-6, 2018 | Mainport Hotel | Rotterdam, Netherlands



Platts 5th annual European Petrochemicals Conference returns to Netherlands in 2018 with a completely new program design. Select the part of the petrochemicals value chain you want to follow and make the most out of that. This unique and focused event will delve deep into the regional petrochemicals market, inviting senior executives from across the sector to assess the current refining growth and evolving trade flows while providing an unrivalled overview of the feedstocks, olefins and aromatics markets.

Why attend:

- **Essential intelligence on the European petrochemicals sector from those at the forefront**

Join Influential market leaders and foremost experts from the international petrochemicals community as they evaluate the industry's evolving downstream landscape in Europe and globally and discuss future growth opportunities in this volatile time.

- **Brand new program structure – pick the session that suits you**

Learn from the leaders about the latest pressing issues influencing the petrochemical industry in 2018 and moving forward at the newly re-designed plenary sessions. Comprehensive analysis of the olefins & polymers as well as the aromatics & methanol in the focused streams.

- **The impact of market volatility on trading and risk management**

Hear from experts in international trading as they discuss and explore the risks and opportunities in the financial landscape surrounding the petrochemicals market. The focus will be on identifying strategies for successfully capitalizing on volatility, preparing for a dynamic future and guarding against unnecessary risk.

- **Network, learn and do business with unrivalled industry thought leaders and market makers**

The 5th annual European Petrochemicals Conference encourages delegate participation and networking opportunities. One and a half days comprised of interactive panel discussions and speaker sessions combine with a variety of social functions and mobile event app, all specifically developed to increase the exchange of value

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Event overview

- Session 1: European Petrochemicals big picture in 2018 – understand the macroeconomics and the strategies in times of oil market volatility
- Session 2: Exploring petrochemical feedstock markets today and tomorrow – get the leaders' perspective
- Stream Session 1: Olefins, polymers & plastics dynamics and their security of supply stream
- Stream Session 2: Aromatics & methanol focused stream
- Session 3: What's the regional demand outlook, opportunities and challenges in the construction, automotive, packaging and manufacturing markets for the petrochemicals sector?
- Session 4: Understanding the changing landscape of global petrochemicals marketing: What are the pressing issues for Middle East, China, and North America?
- Session 5: Logistical challenges in petrochemicals facilities, storage and transportation

Speakers Include:

- **Klaus Ries**, Vice President Global Business Management Styrenic Foams, **BASF**
- **Stephen Bowers**, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**
- **Vikram Sampat**, Vice President - SBU Head-PX/OX, **Reliance**
- **Maria Ciliberti**, VP Polyolefins Marketing & New Business Development, **Borealis** (subject to final confirmation)
- **Rafael Domingo Larráz Mora**, Corporate Engineering Director, **CEPSA**
- **Stefano Soccol**, Vice President, Business Unit Intermediates, **Versalis** (subject to final confirmation)
- **György Halász**, Chief Economist Team, **MOL GROUP**
- **Guido Naberfeld**, Head, Global Product Management Polycarbonates, **Covestro**
- **Rewati Jain**, Head - Commodities, Group Treasury, **Essar** (subject to final confirmation)
- **Henning Schussmuller**, Senior Manager, Supply Chain & Logistics, **Sumitomo Chemical Europe NVSA**
- **Tae-Yoon Kim**, Energy Analyst – Oil & Natural Gas, **IEA (International Energy Agency)**
- **Walter Mirabella**, Managing Director, **Lyondell Italia** (subject to final confirmation)
- **Andrea Landuzzi**, Global Marketing Director Technology Solutions - Polymer Additives, **SOLVAY**
- **Robert Wudecki**, Maintenance Engineering Unit Director, **PKN ORLEN** (subject to final confirmation)
- **Olivier Treuer**, Executive Director, **Morgan Stanley**
- **Michael Dei-Michei**, Head of Downstream Research, **JBC Energy**
- **Dr. Jörg Rothermel**, Head of Department Energy, Climate Protection and Raw Materials, **German Chemical Industry Association (VCI)**
- **Roberto Ribeiro**, President, **Townsend Solutions**
- **Mike Boswell**, Managing Director, **Plastribution**
- **Alexander Keller**, Partner, Strategy & Operations, Chemicals & Specialty Materials, **Deloitte Consulting**
- **Stephen le Roux**, Head of Economics, **Chemical Industries Association**
- **Monique Wekking**, Senior Business development biobased, **TNO**
- **Dina Abieva**, Sector Analyst – Downstream, **EIC (Energy Industries Council)**
- **Nicholas Mockett**, Head of Packaging M&A, **Moorgate Capital**
- **Viren Doshi**, Global Energy Sector Specialist
- **Aman Amanpour**, President, **AmanpourConsult**
- **Senior representative**, **Port of Tarragona**

About S&P Global Platts

S&P Global Platts is the leading independent provider of information and benchmark prices for the commodities and energy markets. Customers in over 150 countries look to our expertise in news, pricing and analytics to deliver greater transparency and efficiency to markets. Founded in 1909, Platts' coverage includes oil and gas, power, petrochemicals, metals, agriculture and shipping.

The nature of our business as a world-renowned supplier of news for the oil & energy industry means that our events attract the attendance of c-level, strategically-oriented professionals and this is indeed true for our Petrochemicals events.

Each Platts conference provides a cutting edge, market driven agenda mixed with exclusive networking opportunities to ensure our global participants are guaranteed with the highest quality, up-to-the-minute market intelligence and new business opportunities.

12.30 Networking standing light lunch

13.30 Chairman's welcoming remarks

Stephen Bowers, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**

Plenary Session 1: European Petrochemicals big picture in 2018 – understand the macroeconomics and the strategies in times of oil market volatility

13.45 **KEYNOTE ADDRESS**

Global oil market outlook and implications for European petrochemicals markets

- Global oil supply and demand outlook. The impact of US exports and OPEC cuts
- Role of the petrochemical industry in global oil demand growth
- Long-term dynamics of petrochemical feedstocks
- What happens when the world pushes the low-carbon transition?

Tae-Yoon Kim, Energy Analyst – Oil & Natural Gas, **IEA (International Energy Agency)**

14.10 **KEYNOTE ADDRESS**

Refining and petrochemicals production integration: how to stay in the forefront during times of increased market volatility?

- EU & US refining capacity and gasoline blending outlook
- How to remain competitive and add value to existing operations?
- The transition from a supply driven to a demand driven downstream market
- What can be the impact of new technologies and how can they contribute in further integration?
- Analysing the impact of new technologies on FCCU and catalytic reforming

Rafael Domingo Larraz Mora, Corporate Engineering Director, **CEPSA**

14.55 **KEYNOTE ADDRESS**

EMEA petrochemical market political risk and macro-economic outlook

- Brexit influence and European growth forecast
- The US market volatility and the Trump effect
- EV and gasoline market impact in the European petrochemical markets today
- What can be expected within 2018 and in the future?

Olivier Treuer, Executive Director, **Morgan Stanley & György Halász**, Chief Economist Team, **MOL GROUP**

15.30 Networking refreshment break – available to sponsor

Plenary Session 2: Exploring petrochemical feedstock markets today and tomorrow – get the leaders' perspective

16:00 **Global olefin feedstock landscape: Naphtha and NGLs markets in 2018**

- Lower crude oil and naphtha prices: their impact on petrochemical feedstocks
- European olefin feedstock structure dynamics: Outlooks for ethane, propane and butane in Europe
- An update on US NGL production and NGL production overview by region

Michael Dei-Michei, Head of Downstream Research, **JBC Energy**

16.35 **Feedstock trading and origination current and future trends**

- The relation between shale gas feedstock in the US and potential free trade with Europe: How does the future of imports look?
- The increasing role of Middle Eastern suppliers and an update on trade agreements between ME and EU
- EU producers export opportunities to growth markets such as Turkey and North Africa; Is it cost efficient?

17.10 LEADERS DEBATE

Understanding the key downstream and feedstock market drivers to effectively mitigate risk and volatility

- Identifying the key raw materials market drivers to make strategic decisions
- Exploring the potential of biochemicals and circular economy: Recycling chemicals or chemicals from natural sources
- Do we expect a common market and energy policy?
- The role of EU commission: Driving trade with import duty system
- What are the latest updates on environmental and process safety regulations and how do they impact the industry?

Robert Wudecki, Maintenance Engineering Unit Director, **PKN ORLEN** (subject to final confirmation)

Walter Mirabella, Managing Director, **Lyondell Italia** (subject to final confirmation)

Monique Wekking, Senior Business development biobased, **TNO**

Dr. Jörg Rothermel, Head of Department Energy, Climate Protection and Raw Materials, **German Chemical Industry Association (VCI)**

Alexander Keller, Partner, Strategy & Operations, Chemicals & Specialty Materials, **Deloitte Consulting GmbH**

Moderated by:

Stephen le Roux, Head of Economics, **Chemical Industries Association**

17.55 Chairman's day 1 closing remarks

18.00 Networking cocktails reception sponsored by:



Day 2: Tuesday, February 6, 2018

08.15 Networking breakfast

09.00 Chairman's welcoming remarks and review of day 1

Stephen Bowers, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**

Stream Session 1: Olefins, polymers & plastics dynamics and their security of supply stream

09.10 European ethylene and propylene supply and demand outlook

- Current and predicted ethylene feedstock supply
- An update on EU crackers outlook
- An overview of US shale based ethane cracker projects and the impact from current shale production
- Refining grade ethylene and MTO dynamics
- Latest technologies and projects on on-purpose propylene production PDH and MTP

Stefano Soccol, Vice President, Business Unit Intermediates, **Versalis** (subject to final confirmation)

09.40 C4 stream dynamics

- Butadiene, butylene and higher olefins outlook
- Global elastomers demand forecast

Stream Session 2: Aromatics & methanol focused stream

09.10 Aromatic production chain: A view of current feedstocks and alternatives

- The impact of shale on aromatics and the increasing flexibility in feedstocks
- What is the cost and market health? Identifying the risks in shifting to lower cost feedstock
- Highlight alternative feedstock options in the market: Are replacement feedstocks cost effective?
- How much cost saving can we expect from the advancement of alternative options? What is driving this demand?

Monique Wekking, Senior Business development biobased, **TNO**

09.40 Toluene: Market overview

- What would be the impact of US refinery volatility and gasoline dynamics in toluene value chain
- European gasoline market driving toluene

Stephen Bowers, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**

10.10 An update on European olefin and polymer contracts pricing

- Connecting the space between price and value
- Demand-supply balance forecast and its implication on trade

Maria Tsay, Petrochemicals Managing Editor, **S&P Global Platts**

10.40 Networking refreshment break – available to sponsor

11.10 Global polymers trends – Production strategy and European polyolefin market dynamics

- Demand side in developed and developing economies
- Growth drivers, constraints and opportunities
- Identify where the major investments are expected and how they shape the competition
- Polypropylene additional capacity to come online in Asia and ME and the on purpose production through coal and propane

Roberto Ribeiro, President, **Townsend Solutions**

11.40 Global trade flows of polyethylene and polypropylene

- Polyethylene supply in short, medium and long term
- The influence of India and China's continuous appetite as the key drivers for global ethylene demand
- Polypropylene supply in short, medium and long term
- PP demand growth: India to offset China

12.10 PANEL Distribution views on the European polymers sector

- Polymer and plastics demand and pricing
- The PET Trend – Reality, predictions and the impact of recycle streams on EU market
- Safety of supply measurements
- Recognize the most promising markets

Maria Ciliberti, VP Polyolefins Marketing & New Business Development, **Borealis** (subject to final confirmation)

Mike Boswell, Managing Director, **Plastribution**

Nicholas Mockett, Head of Packaging M&A, **Moorgate Capital**

Andrea Landuzzi, Global Marketing Director Technology Solutions - Polymer Additives, **SOLVAY**

Moderated by:

- demand as blending feedstock
- The utilization of toluene in solvent applications – Is it a potential area of growth?

10.10 Identify the opportunities in Methanol market

- Methanol global and regional balance
- Methanol global trade: Is MTO the key driver?
- Methanol price mechanisms and regional feedstock costs
- Key methanol derivatives

10.40 Networking refreshment break – available to sponsor

11.10 The positive trends in the Benzene to Styrene value chain – what are the opportunities there?

- Is the European balanced market going to maintain its health in 2018?
- For how long is China's demand expected to keep growing and what would be the impact of India's boosted capacity?
- Future of supply driving factors: Fluctuating crude oil prices, environmental challenges and regulations
- Styrene and phenolic chain outlook: Feedstock movement, supply side and plant sustainability as the key drivers for styrene production in Europe

Klaus Ries, Vice President Global Business Management Styrenic Foams, **BASF**

11.40 Explore the current dynamics in the Xylene – PX - Polyester value chain

- How much is the European paraxylene market a regulatory driven one?
- Competition to heat up in PX, PTA as new plants come online in Asia
- Identifying the new polyester market structure: EMEA PTA assets reservation and the risk of an oversupplied market
- Which industries will be moving forward due to the growth in the polyester market?

Vikram Sampat, Vice President - SBU Head-PX/OX, **Reliance**

12.10 PANEL Will investment in aromatics continue to grow?

- Aromatics projects investments in Asia and the Middle East: Are we risking overbuilding?
- How is technology driving aromatic demand and supply dynamics?
- How long do we expect this trend to grow, what is the limit?
- Downstream products: What are the margins of phenol/acetone, caprolactam and styrene monomer
- As multinationals appear to be investing

Viren Doshi, Global Energy Sector Specialis

further upstream – what does this trend indicate about the state of the market?

Moderated by:

Bao Ying Ng, Senior Analyst, Price Assessments, S&P Global Platts

12.45 Networking lunch

Session 3: What's the regional demand outlook, opportunities and challenges in the construction, automotive, packaging and manufacturing markets for the petrochemicals sector?

14.00 Downstream Phenol – A View On Polycarbonates

- The polycarbonate world market
- Continuous growth driven by innovation
- Changes in the polycarbonates market and sustainability criteria

Guido Naberfeld, Head, Global Product Management Polycarbonates, **Covestro**

14.30 Accelerating Polyolefin Market Adoption Via Sustainable Stabilization Solutions

Find out how purpose-driven product development utilizing high performance stabilizers can enable the polyolefins industry to become more economically and ecologically sustainable.

- Lightweighting in Automotive
- Durability in Building and Constructions

Andrea Landuzzi, Global Marketing Director Technology Solutions - Polymer Additives, **SOLVAY**

Examining the changing nature of cars – lighter, more efficient, more plastics, more durability

- The role of plastics and polymers in the automobile industry
- Understanding current and future demand
- Consumption of aromatics in the automobile industry

European plastic packaging sector and its development and/or Construction and manufacturing markets outlook

- Exploring what end users want from the petrochemicals industry
- Polyester, resins and plastic demand as growth opportunities
- Understand the thermoplastics and synthetic rubbers usages

15.30 Networking refreshment break

Session 4: Understanding the changing landscape of global petrochemicals marketing: What are the pressing issues for Middle East, China, and North America?

16.00 Middle-East petrochemicals overview: The continuous investment and export capabilities in a global context

- Is the gulf petrochemical industry outpacing global growth?
- An overview of new, highly complex projects in the region
- Aromatics dynamics and derivatives

Aman Amanpour, President, **AmanpourConsult** (subject to final confirmation)

16.20 China – what is the impact of the shifting regulation and additional capacity coming online?

- China's expansive One Belt, One Road initiative impact on the petrochemicals industry
- The latest update on coal to olefins investments and operations

Rewati Jain, Head - Commodities, Group Treasury, **Essar** (subject to final confirmation)

16.40 Understanding U.S. petrochemical growth and its role on world markets

- What would a US border adjustment tax mean for the oil and petchems industry?
- The impact of US logistics and assets management in petrochemicals and petrochemical feedstocks marketing
- US exports map in times of petrochemical and polymers capacity expansions ramp up on an unprecedented scale based on cheap shale gas

Session 5: Logistical challenges in petrochemicals facilities, storage and transportation

17.00 Steam crackers global outlook

- Steam crackers market overview by region: active and future developments: capex, main project developers, project financing, capacity and possibly product market
- Steam crackers marginal health in Europe: Aged and sub world-scale asset in a heavily regulated environment and their competition with ME and Asia

Dina Abieva, Sector Analyst – Downstream, **EIC (Energy Industries Council)**

17.30 CLOSING PANEL

New storage handling capacity in Europe and export logistics facilities in US: Are they shifting the shipping flows and creating new opportunities?

- Where in Europe can we see new storage capacity? Would we have new hub developments?
- The shifting flows from the Middle East and North America
- How can companies mitigate the risk factor?
- Who is setting up the standards on infrastructure requirements?
- The different legislative challenges when moving across borders and regions

Henning Schussmuller, Senior Manager, Supply Chain & Logistics, **Sumitomo Chemical Europe NVSA**
Senior representative, **Port of Tarragona**

Moderated by:

Hetain Mistry, Managing Analyst, **S&P Global Platts**

18.00 Chairman's closing remarks

Stephen Bowers, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**

18.05 End of conference