

4th Annual

European Petrochemicals Conference

Unlocking sustained value in the European petrochemicals industry

March 14-15, 2017 | Radisson Blu Scandinavia Hotel | Düsseldorf, Germany



Platts 4th annual European Petrochemicals returns to Düsseldorf in 2017. 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:

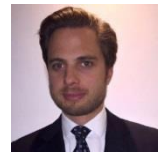
- **Your comprehensive European petrochemical outlook**
This annual conference will help 100+ producers, refiners, traders and buyers understand sector trends, risks and issues within European petchems industry from those at the forefront.
- **Understanding the changing landscape of regional petrochemicals trade**
Hear international petrochemical experts discuss key international market developments and trade flow evolution affecting European players, including; the US, China, Middle East and India.
- **New connections, new ideas, new business**
Network with your market and develop new relationships you need to do your job better through active delegate participation, networking opportunities and mobile application.



Dorothee Arns,
Executive Director,
Petrochemicals Europe, CEFIC



Richard Roudeix,
SVP, Olefins and Polyolefins – Europe, Asia International,
Lyondellbasell



Olivier Treuer,
Executive Director,
Morgan Stanley



Robert Mwasaru,
Head of Polyolefins Sales & Operations Planning, **Borealis**



Stephen le Roux
Head of Economics
Chemical Industries Association, UK



Michael Dei-Michei
Head of Downstream Research,
JBC Energy

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PETROCHEMICALS



Event overview

- Session 1: European Petrochemicals from those at the forefront
- Session 2: Upstream dynamics impacting petrochemical feedstock markets today – macroeconomics, oil volatility and NGL's
- Session 3: Olefins, polymers & plastic conversion dynamics
- Session 4: Naphtha, gasoline blending & aromatics focus
- Session 5: Methanol focus
- Session 6: Outside looking in – international trade perspective
- Session 7: Understanding the changing landscape of global petrochemicals trade
- Session 8: European petrochemicals trade flow evolution
- Session 9: Looking ahead – opportunities and challenges on the horizon for the sector

Speaker Line Up:

- **Dorothee Arns**, Executive Director, **Petrochemicals Europe, Council for the European Chemicals Industry (Cefic)**
- **Richard Roudeix**, Senior Vice President of Olefins and Polyolefins – Europe, Asia and International, **Lyondellbasell**
- **Robert Mwasaru**, Head of Polyolefins Sales & Operations Planning, **Borealis**
- **Laique Rehman**, CEO, **US Petrochemicals**
- **Olivier Treuer**, Executive Director, **Morgan Stanley**
- **Carsten Fritsch**, Commodity Analyst, **Commerzbank**
- **Andrew Neal**, NGL Analyst, Platts Analytics, **S&P Global Platts**
- **Stephen Bowers**, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**
- **Stephen le Roux**, Head of Economics, **Chemical Industries Association, UK**
- **Andrew McIntee**, Consultant, **KBC Advanced Technologies**
- **Fang Wei Lim**, Managing Director, **AFCO Petrochemicals**
- **Andrey Kostin**, Director, **Rupec**
- **Aman Amanpour**, President, **AmanpourConsult**
- **Michael Dei-Michei**, Head of Downstream Research, **JBC Energy**
- **Genoveva Climent**, Commercial Director, **Port of Tarragona**
- **Eelco Dekker**, Chief Representative Europe, **Methanol Institute**
- **Tom Nash**, LPG Consulting/Analyst, **Poten & Partners**
- **Jan Edelman**, Analyst, **HSH Nordbank**
- **Nicholas Mockett**, Head of Packaging M&A, **Moorgate Capital**
- **Mike Boswell**, Managing Director, **Plastribution**
- **Hetai Mistry**, Managing Analyst, Petrochemical Analytics, **S&P Global Platts**
- **Nandita Lal**, Managing Editor, Petrochemicals, EMEA, **S&P Global Platts**

About S&P Global Platts

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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.

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Day 1: Tuesday, March 14, 2017

08.20 Networking breakfast – available to sponsor

09.20 Chairman's welcoming remarks

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

Session 1: Unlocking sustained value in the European petchems industry from those at the forefront

09.00 KEYNOTE ADDRESS
Oil price down – everything ok?

Dorothee Arns, Executive Director, **Petrochemicals Europe, Council for the European Chemicals Industry (Cefic)**

09.30 European olefins - outlooks for ethylene, propylene and butadiene

- Demand outlook and price dynamics
- European capacity and import balance analysis
- Export opportunities – east or west?
- Is the US going to export polyolefins to Europe?

Richard Roudeix, Senior Vice President of Olefins and Polyolefins – Europe, Asia and International, **Lyondellbasell**

10.00 LEADERS DEBATE
Understanding the sector's current strength and future health

- Will we see imports of ethylene and polyethylene keep rising?
- Will we see further feedstock balance changes?
- Investment opportunities for players in Europe – will there be any?
- LPG's competitiveness Vs. Naphtha: Is it sustaining?

Dorothee Arns, Executive Director, **Petrochemicals Europe, Council for the European Chemicals Industry (Cefic)**
Robert Mwasaru, Head of Polyolefins Sales & Operations Planning, **Borealis**
Stephen Bowers, Global Projects, Advanced Intermediates - Performance Intermediates, **Evonik**

Moderated by:
Hetai Mistry, Managing Analyst, Petrochemical Analytics, **S&P Global Platts**

10.30 Networking refreshment break – available to sponsor

Session 2: Upstream dynamics impacting European petrochemical feedstock markets today – macroeconomics, oil volatility and NGLs

11.00 Macro-economic outlook for the European petrochemical industry

- Brexit impact and Asian growth outlook
- US interest rates and currency market fluctuations
- What can the sector expect for the remainder of 2017?

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

11.25 Global oil fundamentals in 2017

- Core trends in global oil markets in 2016-17
- Factors likely to play a part in influencing world oil markets and prices
- Other significant developments in the global energy markets

Carsten Fritsch, Commodity Analyst, **Commerzbank**

11.50 NGLs markets in 2017 – outlook for ethane, LPG and light naphtha

Tom Nash, LPG Consulting/Analyst, **Poten & Partners**

12.15 PANEL
US NGLs — are they still the game changer?

- Recent history of US NGL production
- Outlooks for ethane, propane and butane to Europe
- The impact from declining shale production
- The changing relationships between producers and midstream companies in the states
- NGL production forecast by region

Andrew Neal, NGL Analyst, Platts Analytics, **S&P Global Platts**
Laique Rehman, CEO, **US Petrochemicals**
Michael Dei-Michei, Head of Downstream Research, **JBC Energy**

Moderated by:
Nandita Lal, Managing Editor, Petrochemicals, EMEA, **S&P Global Platts**

12.45 Networking lunch – available to sponsor

Session 3: Olefins, polymers & plastics dynamics

13.45 Global olefin feedstock landscape: Who is Grabbing the market share?

- Lower crude oil prices and impact on petrochemical feedstocks
- US shale based ethane cracker projects
- European olefin feedstock slate structure
- Propane dehydrogenation (PDH) and Asian olefin structure
- Low naphtha prices here to stay- temporary or structural

Hetai Mistry, Managing Analyst,
Petrochemical Analytics, **S&P Global Platts**

14.10 New entrants, new challenges - searching strategic levers for European polyolefin producers

Robert Mwasaru, Head of Polyolefins Sales & Operations Planning, **Borealis**

14.35 Distribution views on the European polymers sector and with a special focus on the UK

Mike Boswell, Managing Director
Plastribution

15.00 European plastic packaging sector and its development

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

15.25 Networking refreshment break – available to sponsor

15.55 **CASE STUDY**

Combining technology, operating knowledge and product leadership for enhanced competitive advantage during times of increased market volatility

- Critically reviewed new Refinery Petrochemical complex configurations
- Optimising economic attractiveness with strategic objectives
- Matching market demands with assessment of products and by-products
- Energy, equipment reliabilities and operational costs considerations
- Analysing the impact of new technologies

Andrew McIntee, Consultant,
KBC Advanced Technologies

Session 4: Naphtha, gasoline blending & aromatics focus

15.25 EU Refining industry outlook – is the gasoline spark fading?

- Capacity outlook, demand projections and new player dynamics
- EU Gasoline blending outlook - will gasoline blending components premium continue to fall?
- Demand outlook from ME and West African buyers
- Will toluene and mixed Xylenes premiums rebound?
- MTBE export situation today

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

16.50 Global aromatic trends

- Impact of shale on aromatics
- Middle East and Asian aromatics investments
- Global aromatics trade balances

Nandita Lal, Managing Editor, Petrochemicals, EMEA, **S&P Global Platts**

17.15 **CASE STUDY**

New storage capacity into the Med market, challenging the actual shipping flows and creating new opportunities

- Increasing storage capacity into the Med: local hub position
- Challenging flows: Attracting flows from the Middle East and northern European
- Supporting the major petrochemical cluster in south Europe

Genoveva Climent, Commercial Director,
Port of Tarragona

Session 5: Methanol focus

17.40 European methanol - trends and drivers

- Will the market recover?
- European capacity outlook
- Chinese polyolefin and MTO demand outlook
- Will we see prices rebound?

Eelco Dekker, Chief Representative Europe,
Methanol Institute

18.05 Networking reception – available to sponsor

Day 2: Wednesday, March 15, 2017

08.20 Networking breakfast – available to sponsor

09.00 Chairman’s welcoming remarks and review of day 1

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

Session 6: Managing risk in the European petrochemical markets today

09.25 Managing risk in the European petrochemical markets today

Olivier Treuer, Executive Director, **Morgan Stanley**

Session 7: Understanding the changing landscape of global petrochemicals trade

09.50 Red, white and BOOM – understanding U.S. petrochemical growth and its new found dominance on world markets

Andrew Neal, NGL Analyst, Platts Analytics, **S&P Global Platts**

10.15 What would a US border adjustment tax mean for the oil and petchems industry?

Jan Edelman, Analyst, **HSH Nordbank**

10.40 Middle-East and Iran petrochemicals update: New wave of Investments in the context of domestic needs and global landscape

Aman Amanpour, President, **AmanpourConsult**

11.05 Networking refreshment break – available to sponsor

11.35 China – petrochemical demand, capacity additions and policy developments

Fang Wei Lim, Managing Director, **AFCO Petrochemicals**

Session 8: European petrochemicals trade flow evolution

12.00 Prospects and outlook for the Russian petrochemical sector

Andrey Kostin, Director, **Rupec**

Session 9: Looking ahead – opportunities and challenges on the horizon for the sector

12.25 CLOSING PANEL

Looking ahead – Where are the next arb opportunities for European players?

Laique Rehman, CEO, **US Petrochemicals**
Aman Amanpour, President, **AmanpourConsult**
Andrey Kostin, Director, **Rupec**
Fang Wei Lim, Managing Director, **AFCO Petrochemicals**

Moderated by:

Nandita Lal, Managing Editor, Petrochemicals, EMEA, **S&P Global Platts**

12.50 Chairman’s closing remarks

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

13.00 End of conference