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Inaugural

GASOLINE, NAPHTHA & LPG CONFERENCE

Maximizing profitability at the light end

November 7–8, 2016 | Mainport Hotel | Rotterdam, Netherlands

Sebastien Bruna,
VP Corporate Strategy,
Total

Antonio Merino,
Chief Economist,
Repsol

Albert de Geest,
CEO,
Liquigas

David Fyfe,
Head of Market Research & Analysis,
Gunvor Group

Matthew Parry,
Senior Oil Analyst,
International Energy Agency

Michael Kelly,
Deputy Managing Director,
World LPG Association (WLPGA)

SPONSORED BY:

Port of Rotterdam

TOPICS DISCUSSED WILL INCLUDE:

Spotting the latest developments in the downstream:
Macroeconomic trends, global oil fundamentals and the current state of play for European refining.

Dissecting threats and opportunities for gasoline:
How long can it remain the main margin driver of healthy margins, examining trends towards consumption of higher quality gasoline, electrification of transport vehicles impact on gasoline demand, market focuses on the US, Africa and the Middle East, and dissecting the sharp reversal of fortunes for gasoline over diesel.

Examining the latest on the naphtha business case:
Demand from European petrochemicals and other regions, European balance management – strategies on how to handle a refinery during low petrochemical demand cycles, blending component developments, bio-substitution alternatives, and naphtha versus LPG: competition for petchem cracking – who is grabbing market share?

Update on LPG fundamentals today:
Opportunities in increasing production, shifting trade routes and changing demand profiles, investments and future of renewable energy and implications for LPG last mile connectivity, latest on LPG pricing, how can it address household air pollution and increasingly provide a cooking solution for consumers in developing markets, and innovations in LPG application design: what will spur further growth?

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Platts Inaugural Gasoline, Naphtha and LPG conference provides the perfect environment for networking, making new contacts and developing new business opportunities with senior professionals from across the downstream value chain. A variety of sponsorship packages are available, depending on your particular requirements and budget:

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TOUR OF THE PORT OF ROTTERDAM

Set sail for a tour of the Port of Rotterdam at the the end of day one of the conference.

Join your fellow delegates and speakers for a selection of drinks, canapés and an evening meal courtesy of our host sponsor the Port of Rotterdam.

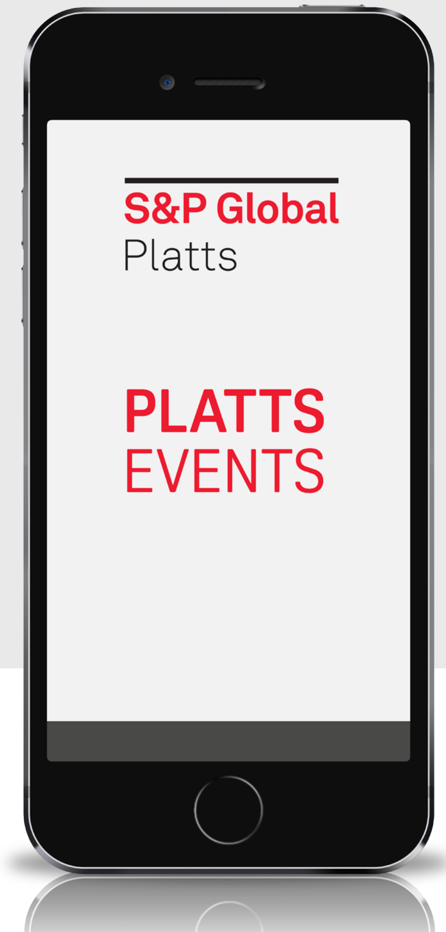
OTHER UPCOMING PLATTS EMEA OIL EVENTS

10th Anniversary European Refining Summit
September 29-30 • The Hotel • Brussels, Belgium

5th Annual Mediterranean Bunker Fuel Conference
December 1-2, 2016 • Ethniki Conference Centre • Athens, Greece

4th Annual Middle East Crude Summit
December 6, 2016 • Crowne Plaza Dubai • Dubai, UAE

Inaugural Middle East Refined Products Summit
December 7, 2016 • Crowne Plaza Dubai • Dubai, UAE



EVENT LAPTOP AND MOBILE APP

Benefit from improved networking on-site by accessing the delegate list, exchange contact information electronically and send live messages to fellow attendees. Additionally, all presentations will be uploaded as soon as they are made available for publication by our speakers.

DAY 1: MONDAY, NOVEMBER 7, 2016

08.00 Registration and breakfast – available to sponsor

08.55 Port of Rotterdam's opening remarks
Yvonne van der Laan, Vice President Industry and Bulk Cargo, **Port of Rotterdam**

SETTING THE SCENE – SPOTTING THE LATEST TRENDS IN DOWNSTREAM – PART ONE

09.00 KEYNOTE PANEL DISCUSSION Global oil fundamentals: rebalancing amid geopolitical turbulence
- The macro & oil demand backdrop – low price vs sub-trend GDP growth
- Beacons of growth – crude vs. light ends vs. heavier products
- Two years of $50 oil – the impact on supply
- US shale supply – has the shakeout run its course?
- Non-OPEC supplies under pressure
- Global balances turning tighter
- OPEC and the re-emergence of geopolitical risk
- What lies ahead? Seeking a new equilibrium for crude

David Fyfe, Head of Market Research & Analysis, **Gunvor Group**
Antonio Merino, Chief Economist, **Repsol**
Moderated by:
Jeff Bair, Managing Editor, US Gasoline, LPGs and Naphtha, **S&P Global Platts**

09.40 The current state of play for European refining and reasons for higher margins – are they here to stay?
- How this year's refining margins in Europe are below last year's but still remain healthy
- Exploring the latest utilization rates, what is being built and trends for the future
- Implications of COP21 and European environmental targets on the refining industry
- What will be the impact of new large ships entering the market and new trade routes emerging following the Panama Canal expansion?
- Despite a margin renaissance, European refiners will continue to face challenges long term from structural demand decline, overcapacity, regulation and competition globally

Sebastien Bruna, VP Corporate Strategy, **Total**

10.00 Gasoline, naphtha & light ends: where fuels and chemicals meet
- Production and throughput in the port of Rotterdam
- Changing markets mean changing logistics
- Creating a hub position in fuels and chemicals

Ronald Backers, Advisor Business Intelligence, **Port of Rotterdam**

10.20 Refreshment Break – available to sponsor

EXAMINING THE BIG PICTURE FOR GASOLINE, NAPHTHA AND LPG

10.50 How gasoline remains the main driver of healthy refinery margins: but for how long?
- How 2015 was a game-changing year for the global gasoline markets
- Exploring the sustainability of recent demand growth, particularly in the US and China
- How will the pace of efficiency gains and regulations impact demand?
- Refining outages and impact on gasoline prices
- Examining the reforming spread or gasoline's premium to naphtha

Robert Campbell, Head of Oil Products Research, **Energy Aspects**

11.10 Outlining naphtha demand from the European petrochemicals sector and other regions
- How much will US naphtha be needed for Asian and European petrochemical production: are we currently oversupplied in naphtha?
- Latest on cracker margins for petrochemicals producers and demand growth East of Suez
- How growth is higher in Asia and the Middle East due to new ethylene capacity
- What are the major petchem projects, particularly in the Middle East and Asia?

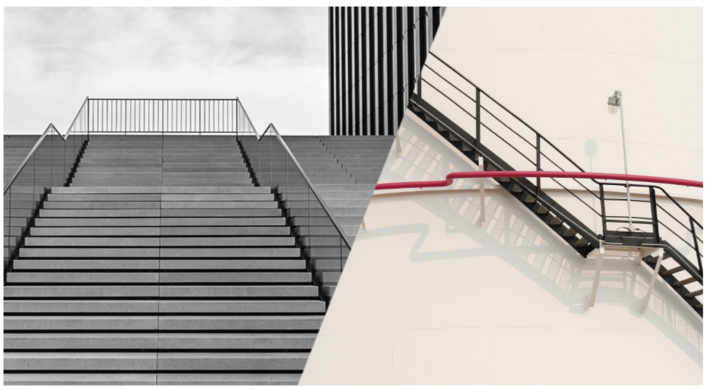
Andrada Irimie, Crude Oil and Refined Products Market Analyst, **JBC Energy**

11.30 Increasing production, shifting trade routes and changing demand profiles – what are the opportunities for LPG?
- Supply and demand by market, especially east of the Suez canal, and trends for LPG trade
- US shift from importer to world's largest LPG exporter
- How LPG markets could remain focused on capex availability and the last mile connectivity

Michael Kelly, Deputy Managing Director, **World LPG Association (WLPGA)**

11.50 Group Q&A
- Presenters from the proceeding session will take questions from the Chair

12.05 Networking Lunch – available to sponsor



POLICY AND MARKET CHANGES IMPACTING THE SUPPLY AND DEMAND OF LIGHT ENDS

13.05 Preparing for the electrification of transport vehicles and the impact on gasoline demand
- Assessing the latest in markets such as France and The Netherlands electric switchover in 2025
- Outlining battery technology breakthroughs and the electrification pace as a result
- General automotive demand levels and impact on gasoline

Greg Archer, Clean Vehicles Manager, **Transport & Environment**

13.25 Gasoline in the vehicle parc – a renaissance?
- Impact of diesel emissions scandal
- Meeting future CO2 and air quality standards in a cost effective way
- Electric vehicles vs state-of-the-art ICE based vehicles
- Technology neutral vehicle regulation

John Cooper, Director General, **FuelsEurope**

13.45 PANEL Impact of Dieselgate: dissecting the sharp reversal of fortunes for gasoline over diesel and future trends
- Exploring the latest supply and demand, and prices regionally for gasoline and diesel
- How effective have steps been to increase gasoline (and naphtha) production?
- How a rebound in gasoline demand in the EU means barrels staying in the region
- How diesel is less sensitive to price changes compared to gasoline – will gasoline demand fail to keep up with rising supply?
- Will European produced diesel face an onslaught of imports from new refineries emerging in the Middle East and Asia and expanded production in the US

Francesco Di Salvo, Oil Market Analyst, **S&P Global Patts**
Greg Archer, Clean Vehicles Manager, **Transport & Environment**
John Cooper, Director General, **FuelsEurope**
Moderated by:
Jeff Bair, Managing Editor, US Gasoline, LPGs and Naphtha, **S&P Global Platts**

14.15 Refreshment Break – available to sponsor

SPECIAL LPG FUNDAMENTALS SHOWCASE

14.45 Investments and future of renewable energy and implications for LPG last mile connectivity
- How, if there are solar panels and batteries available to store power, it will become a question of price, reliability and safety between renewable energy and LPG
- How do we price solar energy and attempt to equate the molecule with traditional fuels?

Rewati Jain, Head - Commodities, Group Treasury, **Essar Services India**

14.55 LPG bulk storage and distribution – best practices from New Zealand
Albert de Geest, CEO, **Liquigas**

15.15 PANEL Innovations in LPG application design: what are we seeing to spur further growth of the industry?
- Exploring availability for and awareness of LPG applications from end users
- Examining large-consumption applications that can bring new volumes of LPG to market
- Investigating the feasibility of LPG as marine fuel – how viable is it; safety, price and supply, and possible segment uses?

Michael Kelly, Deputy Managing Director, **World LPG Association (WLPGA)**
Kalinda Magloire, CEO and Co-founder, **SWITCH S.A**
Albert de Geest, CEO, **Liquigas**
Moderated by:
Jeff Bair, Managing Editor, US Gasoline, LPGs and Naphtha, **S&P Global Platts**

15.45 Chairman's concluding remarks and close of day one
Jeff Bair, Managing Editor, US gasoline, LPGs and Naphtha, **S&P Global Platts**

16.00

TOUR OF THE PORT OF ROTTERDAM

Join your fellow delegates and speakers for a selection of drinks, canapés and an evening meal courtesy of our host sponsor the Port of Rotterdam.

DAY 2: TUESDAY, NOVEMBER 8, 2016

08.30 Registration and breakfast – available to sponsor

09.20 Chairman's welcoming remarks
Jeff Bair, Managing Editor, US Gasoline, LPGs and Naphtha, **S&P Global Platts**

SETTING THE SCENE – SPOTTING THE LATEST TRENDS IN DOWNSTREAM – PART TWO

09.30 Global oil market outlook: examining the next 5 years, particularly in relation to the light end of the barrel
Matthew Parry, Senior Oil Analyst, **International Energy Agency**

09.50 Examining the latest impact of sanctions on Iran and Russia for global gasoline, naphtha and LPG markets
- With the lifting of sanctions, how will Iran's production impact the global market and the US market?
- What sanctions remain for Iran?
- What to do and not do when dealing with Iran?
- Latest on Russian sanctions and what to watch out for

Daniel Martin, Partner, **Holman Fenwick Willan LLP**

10:10 Maximizing your margins with volatility analysis
Vito Turitto, Manager Quantitative Analysis, **S&P Global Platts**

EXAMINING MARKET & OPERATIONAL DEVELOPMENTS, CHALLENGES & INNOVATIONS FOR LIGHT ENDS

10.30 PANEL Naphtha vs. LPG: competition for petchem cracking – who is grabbing market share?
- Exploring the ability to switch between naphtha and LPG for producers
- LPG maximization by European crackers: How well is LPG competing with naphtha and other feedstocks?
- To what extent does feedstock selection favour LPG in North America?

M H. Peyvandi, Vice President, **National Petrochemical Company, Iran**
Sebastien Bruna, VP Corporate Strategy, **Total**
Moderated by:
Hetain Mistry, Managing Analyst, Petrochemicals, **S&P Global Platts**

11.00 Examining the trend towards consumption of higher quality gasoline and implications
- Latest on the ability of refiners to switch yields and blending operations including the use of higher-octane blending components

Csaba Zsótér, Product and Renewables Trading Manager, **MOL**

11.20 Refreshment Break – available to sponsor

MARKET PERSPECTIVES: DEVELOPMENTS, CHALLENGES AND NEW BUSINESS OPPORTUNITIES IN LIGHT ENDS

11.50 US gasoline: exploring a resurgence in profitability and utilization through cheap crude
- Examining the advantages it has over Europe with even cheaper crude and better demand: are rising US exports cutting into European margins?
- Assessing the long term benefits of 2015 for US gasoline
- Why has the US decided to export its increased crude production rather than minimize import requirements?

Francesco Di Salvo, Oil Market Analyst, **S&P Global Patts**

12.10 PANEL Gasoline: latest on outlet markets and trade flows – Africa and the Middle East
- Trade routes from Europe to markets such as Nigeria and Ghana and Iran
- Outlining buying interest from West Africa – exploring the latest price assessments
- Latest on deregulation in Africa, particularly in Nigeria
- Update on Iranian expansion and exporting growth prospects

Andrada Irimie, Crude Oil and Refined Products Market Analyst, **JBC Energy**
Matthew Parry, Senior Oil Analyst, **International Energy Agency**
Aleru Chioma, Enterprise Risk Management, **Aiteo Group**
Moderated by:
Jeff Bair, Managing Editor, US gasoline, LPGs and Naphtha, **S&P Global Platts**

12.40 PANEL Developing markets: how LPG can address household air pollution and increasingly provide a cooking solution for consumers
- Can LPG become an affordable option for many?
- Examining supply, policy and infrastructure challenges in Africa, and importance of robust cylinder management

Kalinda Magloire, CEO and Co-founder, **SWITCH S.A**
Rewati Jain, Head - Commodities, Group Treasury, **Essar Services India**
Albert de Geest, CEO, **Liquigas**
Aleru Chioma, Enterprise Risk Management, **Aiteo Group**
Moderated by:
Jeff Bair, Managing Editor, US gasoline, LPGs and Naphtha, **S&P Global Platts**

13.10 Chairman's concluding remarks and close of conference
- To what extent will gasoline, naphtha and LPG, along with jet fuel, be the last ones standing for the oil industry?

Jeff Bair, Managing Editor, US gasoline, LPGs and Naphtha, **S&P Global Platts**

13.15 Close of conference

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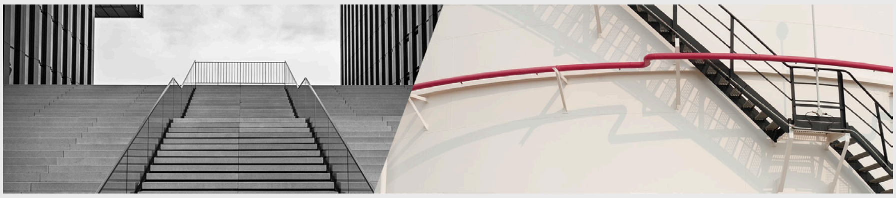

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Your conference registration does not include accommodation. A limited number of rooms have been reserved for the conference attendees at The Hotel. Brussels at the preferential rates listed below. Please note that these discounted rates will apply for the nights of November 6 and 7, 2016 only. These rates will be honored until August 28, 2016 or until the group block is sold-out, whichever comes first. — subject to availability.

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City XL Room: € 139.00
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