

US Fuels Markets & Refining Strategy Conference

13th & 14th November 2019 // Houston, Texas



Key Topics

- Comprehensive Analysis Of The Key Policies & Regulations Impacting On US Refining Operations
- Evaluating The Industry`s Response To The Upcoming Regulatory Requirements
- In Depth Outlook Into The Crude Oil Markets` Turns & Future Export Routes
- Exploring Key Technology Innovations & New Fuel Blending Properties
- Enhancing Greater Refining Reliability & Project Control
- Assessing The Impact Of Growing Exports` Demand Of The US Refined Products
- Examining The Influence Of Transport Electrification On The US Fuels Markets
- In Search For Further Solutions to Enhance Business Flow: Making The Most Of The Petrochemical Production
- Evaluating Key Challenges & Opportunities Of Future 15% Ethanol Gasoline (E15) Use
- In Depth Insights Into The Global Distillate Demand Trends

FOR SPONSORSHIP AND COMMERCIAL OPPORTUNITIES, PLEASE CONTACT L
LUIS ZANETTA +44 203 848 8684 l.zanetta@acieu.net

US Fuels Markets & Refining Strategy Conference

Houston, Texas

13th - 14th
November
2019

ACI's is pleased to announce the first edition of US Fuels Markets & Refining Strategy Conference. The event will bring together senior executives and experts from the refining industry, policy makers, consultants, technology innovators and leading market analysts to discuss the latest challenges and developments within the industry.

The two day event will give you an insight to the industry's latest regulations impacting on refining sustainability, US production capacities, crude oil markets, future forecasts on fuel demand, as well as export & trading activities. In depth insights into the MARPOL regulation & Corporate Average Fuel Economy (CAFE Standards, followed by the possible impact of Electric Vehicles will provide a solid background for the two days discussion on best solutions for refining industry in US.



Join us in Houston, the host city for the 2019 edition!

Key Topics for 2019 Discussion:

- **Comprehensive Analysis Of The Key Policies & Regulations Impacting On US Refining Operations**
- **Evaluating The Industry's Response To The Upcoming Regulatory Requirements**
- **In Depth Outlook Into The Crude Oil Markets' Turns & Future Export Routes**
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- **In Depth Insights Into The Global Distillate Demand Trends**

Registration is simple:

If you would like to register for this event or wish to find out more information, you can contact: **Rafael Krupa**

Tel: +48 61 646 7040 Email: rafael@acieu.net

Sponsorship & Exhibiting Opportunities:

With leading companies and organisations from the refining industry attending and speaking at the event, we have the perfect vehicle to provide outstanding exposure to a senior level audience.

There are various sponsorship packages available, including sponsorship of cocktail reception on the first evening of the event and sponsorship of a networking lunch. For further details, please contact:

Sam Cormack

Tel: + 44 (0)20 3141 0628

Email: samc@acieu.net

Who should attend:

Senior refining industry representative, Regulatory and policy officers, Industry analysts and logistics experts, Researchers, Process technology providers/EPC contractors, Fuel additive suppliers, Environmental organisations, Consultants

Speaking Opportunities:

If you would like to be considered as a speaker at the event for a 30 - 45 mins presentation, please submit an abstract for consideration to:

Sarah Ajawin

Tel: +44 (0)20 3141 0643

Email: sajawin@acieu.net

DAY 1

Wednesday 13th November 2019

08:00 **REGISTRATION & COFFEE**

09:00 **CHAIR'S OPENING REMARKS**


VP - Head of Americas Downstream Consulting
Wood Mackenzie

SESSION ONE

Key Policies & Regulations Impacting US Refining Operations

09:15 **In depth outlook in to the MARPOL, Annex VI post 2020: A Refining perspective**

- Technical Options for Refiners
- Economics
- Scenarios for the Refining Industry


Energy Analyst
ESAI Energy LLC

09:45 **Implementing an emergency regional fuel waivers program**



Blake Kinney
Policy & Regulatory Analyst
Southern States Energy Board

10:15 **Proposed Regulatory Changes Relating to E15 waiver & RIN/RFS**

Brendan K. Collins
Manufacturing Group Leader and Environment & Natural Resources Partner
Ballard Spahr LLP

10:45 **Panel Q&A**

11:05 **MORNING REFRESHMENTS**

11:35 **PANEL DISCUSSION**

Evaluating The Industry's Response To The Upcoming Regulatory Requirements

- Impact of MARPOL, Annex VI on refining operations & practices
- Evaluating refineries readiness to meet the IMO requirements post 2020
- Understanding CAFE standards in practice & its impact on cars & engines efficiency
- Ensuring continuous business growth while meeting regulatory targets


Managing Partner
Deloitte


Senior Industry Expert
McKinsey & Company

12:20

CONFERENCE PRESENTATION

Crude Oil Market Outlook: Supply, Demand & Pricing Trends

- In-depth analysis of the key the drivers for crude price fluctuations through 2019 and into 2020
- Assessing the future demand for & availability of heavy crude in the US refining industry


Associate Director, Energy Institute, A.B.
Freeman School of Business
Tulane University

13:05 **LUNCH**

14:05

CONFERENCE PRESENTATION

Evaluating Key Challenges & Opportunities Of Future 15% Ethanol Gasoline (E15) Use

- Assessing the impact of E15 use for refineries, customers & stations operators
- Evaluating the impact of E15 on gasoline from crude demand
- Adjusting the cars & petrol stations to the E15 gasoline use in the future


Senior Vice President
American Coalition for Ethanol

SESSION TWO

Exploring Key Technology Innovations to Enhance Refinery Performance

Digitalization – Key Factors for a Successful Transformation in the Refining Sector

14:50

- The Digital Paradox – Benefits and direction of change are clear, but for the most part companies have only experienced frustration
- How to build a successful Digital Transformation journey
 - o Setting the strategy – understanding better the effort behind Use Cases before prioritizing the target Digital portfolio
 - o Understanding the crucial enablers
 - Outside partners and vendors
 - Data quality and availability
 - Required transformation within IT & systems
 - Transformation of the operating model when scaling up from pilots
 - Aligning culture & building Digital literacy
 - o Building the right governance and orchestration
- What to expect from a successful Digital program



José de Sá
Partner
Bain & Company

15:20

Developing a Strategy for Overall Refinery Performance Improvement

- Digitalization technology strategy, analysis & design
- Organizational strategy, analysis and implementation
- Leveraging competencies in HSE, strategy & operations

Bob Snell
Founding Partner
The Quaker Group

15:50

Panel Q&A

16:05

AFTERNOON REFRESHMENTS

16:35

CONFERENCE PRESENTATION

Capital Projects Transformation

Pardeep Sehgal
Managing Director, Supply Chain & Operations
Strategy & Sustainability
Accenture

17:20

CONFERENCE PRESENTATION

Strategies for Employing Better Project Control, Enhancing Reliability & Achieving Excellence in Refining Operations

- Building an aligned operating model
- Operational Excellence areas of focus to increase operating performance & financial results
- Key levers in achieving highly reliable operating assets
- The Operational Readiness dimension of capital investments



Lee J. Laviolette
Managing Director & Chief
Consulting Officer
The Lavister Group, LLC

18:05

CLOSE OF DAY ONE

DAY 2

Thursday 14th November 2019

09:00

REGISTRATION & COFFEE

09:30

CHAIR'S OPENING REMARKS

09:35

CONFERENCE PRESENTATION

High Octane Fuel Market Opportunities

- Current market and long-term outlook for high octane fuels in the US
- Pathways for refiners to produce high octane fuels

Uday Turaga
Founder & CEO
ADI Analytics LLC

10:20

MORNING REFRESHMENTS

10:50

CONFERENCE PRESENTATION

Examining The Influence Of Transport Electrification On The US Fuels Markets

- Exploring the growing importance of the Electric Vehicles on key fuels demand in US
- Finding best strategy & business models to enhance business flow
- Aiming for unified industry's response to transport decarbonisation course

Fellipe Balieiro
Director Energy and Mobility
IHS Markit

11:35

CONFERENCE PRESENTATION

Days of Future Past: A Philosophical View of the Refining Industry's Next 30 Years

- Refining crude oil: the original imperative that pushed crude oil exploration and production companies into integrating into refining and marketing
- Oil from shale formations: How the boom in US crude oil production from shale brings crude oil producers full circle to the early days of the industry's development
- Markets for refined products: how will crude oil producers who are integrated downstream manage the transition from transportation fuels (mixtures of hydrocarbons with boiling range flexibility) as their primary products into the new era of chemicals as their primary products
- Regional concentrations: Will refineries outside the US Gulf Coast aggressively integrate into chemicals? A quantitative review refining capacity & chemicals supply from existing facilities.
- Chemical industry imperatives for primary petrochemicals: How will refining companies compete with chemical companies who are expanding capacity based on low cost ethane and propane supply?



Dan Lippe
Founder
Petral Consulting Company

12:20

LUNCH

Photos from our European Fuels Markets & Refining Strategy Conference

13:20

CONFERENCE PRESENTATION

Maximizing Refinery Value Through Petrochemical Integration

- The development of U.S. shale gas and shale oil has led to an abundant supply of advantaged feedstocks: natural gas liquids (NGLs) and domestic crude
- As the transition to domestic sources of U.S. crude has provided a locational advantage to boost refining profitability, refining-petrochemical integration can also provide a competitive advantage to leverage feedstock advantages on NGLs and optimize molecules produced within a U.S. refinery
- Refiners are now re-embracing petrochemicals, which they were moving away from years ago to focus on refined products. Opportunities for refinery-petrochemical integration across C2s, C3s, C4s and aromatics etc. will be explored



Quincy Jones
Managing Director
FTI Consulting Inc.



14:05

CONFERENCE PRESENTATION

Revamping a hydroprocessing unit into a mild hydrocracker (MHC) to increase flexibility and margins



Pankaj H. Desai
Licensing Sales Manager
Shell Global Solutions (US) Inc.



14:50

CHAIR'S CLOSING REMARKS

Chris Hairel
VP - Head of Americas Downstream
Consulting
Wood Mackenzie



15:00

END OF CONFERENCE & AFTERNOON REFRESHMENTS


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 +48 61 646 7040

 rafael@acieu.net

 <http://www.acius.net>

 **Postal Address:**
ACI Europe, 5/13 Great Suffolk Street, London, SE1 0NS

Registration Is Simple

Conference (Includes access to all documentation) 13 th & 14 th November 2019	\$2,395.00
Documentation Packet Only	\$615.00

Please Note.

Members and customers of all supporting organisations are entitled to a discount off their conference package.

For more information please call +48 616 46 7040

Documentation Packet Available

We are selling the US Fuels Markets & Refining Strategy Conference papers at just \$585 (+\$30 P&P). Simply tick the box on the booking form, send it with payment and your copy will be on its way to you after the meeting. This important manual will be a source of invaluable reference for the future.

About ACI

ACI, a UK owned company, has been running successful conferences in the USA since 1999. Headquartered in Chicago with offices all around the States, ACI opened its European head office at the end of 2005 and has expanded rapidly, launching a series of events in key industries including maritime, energy, oil & gas, cosmetics, chemicals & media.

Terms & Conditions

Payment

Payment must be received within five business days of returning the signed contract. After receiving payment a VAT receipt will be issued. If you do not receive a letter outlining details two weeks prior to the event, please contact the Conference Coordinator at ACI Europe Ltd.

Discounts are available for multiple/group bookings. Please call +48 61 646 7040 for more information.

Cancellations

Substitutions are welcome up to 24 hours prior to the event. Cancellations must be received in writing no less than 3 weeks prior to the start of the conference; a full credit voucher towards a future ACI conference will be issued. Any cancellation received less than 3 weeks prior to the start of the event shall be deemed to be a breach of this contract by client, and accordingly, no credits will be given. Cancellations must be received in writing by mail or fax three weeks before the conference. Thereafter the full conference fee is payable. If for any reason ACI Europe Ltd decides to amend, cancel or postpone this conference, the conference fee will not be refunded. Furthermore, ACI Europe Ltd will not be responsible for covering airfare, hotel or other costs incurred by registrants. In the event that ACI Europe Ltd cancel or postpone the event, ACI Europe Ltd reserves the right to transfer this booking to another conference to be held in the following twelve months, or to provide a credit of an equivalent amount to another conference within the following twelve months. The construction, validity and performance of this agreement shall be governed in all respects by the laws of England to the exclusive jurisdiction of whose courts the Parties hereby agree to submit.

Accommodation

The cost of accommodation is not included in the event fee. Preferential rates will be arranged with or near the event venue, and all confirmed delegates will be given details of how to book accommodation at this rate in due course.



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