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Centre for Management Technology®
into our 26th year

5th ASIA REFINING

Includes Panel Discussion with Refiners & Regulators on Fuels Subsidies & Operational Strategies

20–21 October 2009
Swissotel Merchant Court Singapore

"Optimizing operational excellence and energy efficiency"

JP Morgan Chase Bank
International Energy Agency (IEA)
Planning Commission, Government of India
Ministry of Energy and Mineral Resources, Indonesia
Petrochina
Ministry of Oil, Iraq
Nghi Son Refinery & Petrochemical LLC (NSRP LLC), Petrovietnam
Petrochemical Corporation of Singapore Pte Ltd
AsiaRenewables Pte Ltd
IndianOil Technologies Ltd. (A Subsidiary of Indian Oil Corporation)
Nexant Asia Limited
Mckinsey & Co.
Rabigh Refining & Petrochemical Co. (PetroRabigh)
Haldor Topsøe
Uhde Shedden (Thailand) Ltd
KBC Advanced Technology

Day 1 - Tuesday, 20 October

8:00 Registration & Coffee

9:00 Chairman's Welcome & Remarks
Mike Ellis, Associate Principal
McKinsey & Company

9:10 **Asian Refining: Drivers of Structural Change 2009-2014**
- Global and regional demand outlook 2009-2014
- Prospects for demand growth and contraction in Asia
- Refinery capacity additions and how these will alter the product markets through to 2014
- Implications for Western Hemisphere refineries from Asian growth

*David Martin, Oil Market Analyst, Oil Industry and Markets Division, **International Energy Agency***

9:40 **Current M&A Scene in the Refining Sector**
John Russel, Vice President Asia Pacific
KBC Market Services
KBC Advanced Technology

10:10 **Indonesia's Downstream Prospect & Regulatory Incentives**
Dr. Ing. Evita H. Legowo, Director General, Oil and Gas
Ministry of Energy and Mineral Resources, Indonesia

10:40 Coffee & Networking

11:10 **China's Crude Demand & Refining**
- China's crude production and demand
- Refinery distribution status in quo
- Characteristic of vehicle fuel supply and demand
- New refinery project to come onstream
- Outlook towards 2014

Yang Weijun, Director of Refining & Petrochemical
Dept. of Planning & Engineering Institute
Petrochina

11:35 **India's Refining' Domestic Fuels Demand & the Fuels Export Initiative**
Dr S.C. Sharma, OSD (Petroleum), Planning Commission,
Government of India

12:00 **Vietnam – New Refinery Coming On-Stream, Status and Progress of Production**
Cao Hoai Duong, Deputy General Director /
*Executive Committee Member, **Nghi Son Refinery & Petrochemical LLC (NSRP LLC) Petrovietnam***

12:30 Discussion followed by Lunch

13:45 Afternoon Chairman's Remarks
*Clive Gibson, **Nexant Asia Limited***

13:50 **Panel Discussion:**
HOT
- Fuels' subsidies provided on petroleum consumption, impact and elasticity of demand
- Addressing future product quality challenges around the region
- Successful strategies for achieving a competitive advantage given the downturn in refinery profitability
- Successful project implementation and maintaining investment discipline
- Impact of changes in major refinery's operation (e.g. Reliance) on Asian refining operations
- Attitudes to Refining: profit centre or means to ensure strategic supply security?

*Moderated by: Clive Gibson, **Nexant Asia Limited***

*Panel include: Dr. Ing. Evita H. Legowo, **Ministry of Energy and Mineral Resources, Indonesia***
*Cao Hoai Duong, **Petrovietnam***
*Dr S.C. Sharma, **Planning Commission, Government of India***
*Yang Weijun, **Petrochina***

14:30 **Global and Emerging Asia's Economic Outlook**
*Matt Hildebrandt, Economist, **JP Morgan Chase Bank***

15:00 **Cost Economics of New Refinery Projects & Growth Potential in Asia - EPC Perspective**

15:30 Tea & Networking

16:00 **Improving Refining Operations: Be Ready for a Tough Market Environment**
- How tough is the outlook for refiners?
- Why is operating performance critical?
- How can refiners push operational performance improvement even further?

Mike Ellis, Associate Principal
McKinsey & Company

16:30 **Global Petchem Market Outlook, Impact on Naphtha & LPG Demand**
- Middle East and China olefin capacity build up and impact on the olefin market
- Strategies for Naphtha crackers for survival during these times

Stanley Park, Deputy Managing Director
Petrochemical Corporation of Singapore

17:00 **Impact of IMO Restriction on Bunker Fuel Specifications**

17:30 Discussion followed by Close of Day 1

Day 2 - Wednesday, 21 October

9:00 Chairman's Remarks
David Martin
International Energy Agency

9:05 **Middle East Refining Developments and Impact on Asia's Competitiveness**
- Update on Middle East refining developments
- with the Asian refining industry
- Importance for refiners to maintain sources of competitive advantage

Clive Gibson, Principal, Energy Resources
Nexant Asia Limited

9:30 **Growth & Expansion Plan of Iraq's Refining Sector**
- Rehabilitation of existing refineries
- Expansion & upgrading of existing refineries
- New grassroot refineries
- Emphasis on product quality improvement, raising HSE standards & etc.

Ahmed Al Shamma
Deputy Minister for Refining & Gas Processing
Ministry of Oil, Iraq

10:00 **Petro Rabigh – 4R's Approach: A Key to Corporate Sustainability**
Case Study
- Optimize resources through the adoption of Re-use, Re-cycle, Re-cove & Re-duce (4R's)
- Develop new resource utilization concepts and practices
- Improve environmental performance in alignment with sustainability objectives

Dr Saleh El-Din Salim
Environmental Consultant & Section Head
Rabigh Refining & Petrochemical Co. (PetroRabigh)

10:30 Coffee & Networking

*Program topics, speakers and schedules listed herein are confirmed as at printing time. Please refer to the event's Latest Schedule at **http://www.cmtevents.com/eventschedule.aspx?ev=091036&** for most up-to-date details.*

11:00 **Emission Reductions & Downstream: Practical Opportunities & Points of Caution**

- Overview of emission reductions markets and downstream refining
- Illustrative project example
- Practical benefits and cost considerations

William Byun, Managing Director
AsiaRenewables Pte Ltd

11:30 **Non-Conventional Technologies for Fuel Desulphurization**

- Review of latest non-conventional technologies to reduce fuel sulfhur
- Economic comparison with hydroprocessing technologies
- Details about the progress made in bio-desulfurisation

Dr D K Tuli, Chief Executive Officer
IndianOil Technologies Ltd.
(A Subsidiary of Indian Oil Corporation)

12:00 **Innovative Reactor Technology for Hydrotreating & Hydrocracking of Heavy Feedstocks**

- How can refiners benefit from new hydrotreating and hydrocracking solutions from Topsøe
- New innovative reactor technology for efficient catalyst use at reduced CAPEX
- Hydrocracking revamp case stories

Jesper Rødtjer
Sales & Marketing Manager for Refining Technology
Haldor Topsøe

12:30 **Economics of Upgrading Heavy Residues and Comparison of Latest Options**

Steven van Wagensveld
General Manager, Technology Services
Uhde Shedden (Thailand) Ltd

13:00 Final Discussion followed by Lunch

14:30 End of Conference

"Strategies to stay competitive amidst weak demand and new capacity"

The global refining sector is undergoing structural changes. Tough times are projected for refiners with Moody's forecasting declining demand and emergence of new capacity continue to press refining margins down, thus affecting operational performance through 2009.

In Asia, countries are still regulating control and fiscal subsidies in domestic fuel prices, but volatility in global crude oil and product prices are urging further deregulation. Besides, the demand for increased fuel specifications continue to push for innovative options to improve performance.

Sustaining performance through operational excellence is key focus for refiners. To keep cost low and increase refining margins, refiners have adopted new options such as switching from light and sweet crude, reducing oil processing rate to 80 – 90% of capacity as a counteracting measure against the reduced demand. To what extent have the refiners succeeded?

How effective are the Refiners in optimizing energy and process efficiencies? CMT's **5th Asia Refining** plans to look at macro and micro determinants that define the competitiveness of the refining business.

CMT's **5th Asia Refining** offers executive and current presentation, panel discussion and interactive sessions, examining these key issues and challenges currently faced by Asia's refiners and petrochemicals producers. More than 15 industry executives on the speaker panel will gear up to provide you with the most comprehensive updates and case studies to help you strategize your operation in Asia's downstream sector.

Attend CMT's 5th Asia Refining and gain key intelligence and insights into:

- Forward competitive strategies from refining experts
- Impact of Intra-regional development on Asia's refining outlook
- Macro and micro economic outlook of emerging refining markets
- Zoom into refining "HOT" spots – **Iraq**, **Indonesia**, **India** & **China**
- Operational excellence strategies and case studies
- Domestic fuel pricing and policies of national regulators
- Shifts in EPC players' approach to managing turn-key projects
- Cross examination of petrochemicals sector recovery and feedstock demand
- Technologies and advances in desulphurization and heavy residue upgrading

Mark your calendar to be at this premier gathering of key professionals from across Asia and Middle East, and take this opportunity to network and forge lasting business opportunity.

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5th ASIA REFINING

20–21 Oct 2009 | Singapore

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The full Registration Fee includes cost of all sessions, luncheon, coffee/tea & documentation.

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USD1,695	USD1,395 **(MIN SAVINGS OF USD900)**

** Terms and conditions apply.*

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Fax: 65 63369993
Email: Faye.FernandezInes@swissotel.com
Cut-off date: 22 September 2009

CMT'S UPCOMING EVENTS

12th VOGP 2009

HO CHI MINH CITY | 28-29 OCTOBER

Vietnam is further widening its door for profitable investments by pledging favorable mechanisms and shift in policies. From offshore to power to petrochemicals, the country still offers a goldmine of opportunity for energy ventures and collaboration.

Focus on:

- Strategic planning beyond 2015 for the O&G sectors
- Analysis of the revised Petroleum Law & impact on PSC
- Prospects in CBM to meet Vietnam's energy mix
- Structure of gas market, price & distribution network
- Viability of petrochemical investments in Vietnam
- Plans to develop a competitive power retail market

4 LPGtrade Summit

DOHA, QATAR | 9-11 NOVEMBER 2009

Held under the patronage and to be officially opened by
HE Abdullah Bin Hamad Al-Attiyah
Deputy Premier &Minister of Energy & Industry

4th LPGtrade Summit will take you through discussions in:

- Challenging global economic climate and its impacts on LPG in production and imports
- Outlook on LPG export capacity arising from Middle East & Africa
- Perspective on demand from traditional & emerging import markets
- Trade flow, freight rates and market situation of LPG shipping
- Comtemporary challenges of LPG marketing, trading and logistics

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