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.

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

5th ASIA REFINING
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:
  • 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 grassroots 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
  • 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
“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.

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