

LPG

13th LPG TRADE SUMMIT

22 - 24 Oct 2018 / Istanbul, Turkey

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Summit Day 1 - 23 Oct 2018, Tuesday

- 08:00 Registration and Coffee
- 09:00 Chairman's Welcome & Remarks
Mr. Michael Panas, Managing Consultant, NGLStrategy, LLC
- 09:05 **Opening Address**
Mrs. Ruya Bayegan, Board Member, BGN International - Bayegan Group
- 09:15 **Global LPG Trends & Outlook – Changing Patterns & the Way Forward**
- Global Market Overview & Outlook – Seaborne Trade & Supply / Demand Developments, Challenges and Opportunities
 - Propane & Butane Markets – A Tale of Two Stories
 - The Rising Importance of Petrochemicals
 - Increasing Complexity & the Effect on Global LPG Pricing & Economics
 - Shipping & Outlook
- Mr. Michael Panas, Managing Consultant, NGLStrategy, LLC*
- 09:45 **Black Sea & Mediterranean LPG Markets – Growth & Opportunities**
Mr. Emin Imanov, CEO, BGN International DMCC
- 10:15 **Premium Turkish LPG Market**
- Customer focus both in LPG quality & distribution & sale services
 - Sound supply structure
 - Digital & innovative solutions
- Mrs. Ayse Abamor Bilgin, Supply Chain Director, Aygaz A.S.*
- 10:45 Refreshments & Networking
- 11:25 **LPG Market in Russia & FSU Region: Current Trends & Perspectives**
- Russian LPG market in 2011-2018:

production, consumption and export trade flows

- Russian LPG market's forecast for 2019-2023
- Projects of LPG facilities (plants and terminals) in the Far East of Russia
- Kazakhstan and Ukrainian LPG market

Mr. Damir Khalmetov, LPG & Coal reporter, Thomson Reuters

11:55 **Dynamic Changes in the VLGC Sector**

- Dynamics of the VLGC Shipping Segment incl. New 2020 Regulations
- LPG as Potential Bunker Fuel

Mr. Alex Hadjipateras, Executive Vice President of Business Development, Dorian LPG Ltd. (Dorian LPG Management Corp)

12:30 Discussion followed Networking Luncheon Reception Sponsored & Hosted by



14:00 Afternoon Chairman

Mr. Alex Hadjipateras, Executive Vice President of Business Development, Dorian LPG Ltd. (Dorian LPG Management Corp)

14:05 **Demand/Import Outlook of LPG in South Korea's Petrochemical & Beyond**

Mr. Hyung Mok (Kevin) Kim, Head of Trading Support Team, SK Gas International Pte Ltd

14:35 **Dominance of China's Import? Scope for growth?**

Mr. Tony Liang, Assistant General Manager, Wanhua Chemical Group Co.,Ltd

15:05 **Managing LPG Shipping/Trade Flow with the Expanded Panama Canal**

Mrs. Silvia de Marucci, Executive Manager, Economic Analysis and Market Research Division, Panama Canal Authority

15:35 Refreshments & Networking

16:10 **LPG vs. LNG – Competitor or Co-Exist Partner in Current Times?**

- Natural Gas in SE Asia & South Asia
- Natural Gas and LPG Dynamics

Mr. Ong Han Wee, Consultant, FACTS Global Energy

16:40 **Bangladesh's LPG Demand & Imports Development**

Mr. Mohammed Saidul Islam, Director & CEO, LAUGFS Gas (Bangladesh) Ltd.

17:10 **Panel Discussion**

- How fast US production will increase and how much of this production will be available for exports to the global market?
- US domestic infrastructure constraints How infrastructure limitations can affect the US LPG production growth in 2019 and what will be the effects for the global market.
- Is there enough LPG terminal capacity post-2019 to sustain the expected level of seaborne exports?
- How important is the petrochemical demand for the LPG market? Should we expect a second wave of PDH facilities in China post-2020? What are the developments in LPG steam-cracking capacity in Asia/Europe? Should we expect further LPG consuming projects/expansions?
- Which are the key retail demand issues? Will the large consumers (India, Indonesia, China, etc) continue the current level of retail consumption growth, or are there limitations? What are the threats and opportunities for this growth to continue?
- Which are the emerging retail demand countries/regions (i.e. S. Asia/Africa/etc) – what are the main obstacles to overcome

in order for this expected growing demand to occur?

- When do we expect the VLGC market to balance? How IMO regulations can affect the vessel supply?
- Will LPG be a major consideration for LPG shipping companies as a bunker fuel?
- New opportunities: Is there enough scope for new LPG demand outlets such as power plant demand, use as a bunker fuel or other?

Moderator & Panel:

Mr. Michael Panas, Managing Consultant NGLStrategy, LLC

Mr. Alex Hadjipateras, Executive Vice President of Business Development

Dorian LPG Ltd. (Dorian LPG Management Corp)

Mr. Tony Liang, Assistant General Manager Wanhua Chemical Group Co.,Ltd

Mr. Ong Han Wee, Consultant, FACTS Global Energy

Mr. Mohammed Saidul Islam, Director & CEO, LAUGFS Gas (Bangladesh) Ltd.

Mr. Zayyanu Yabo Tambari, Asst. Chief Chemical Engineer, Gas Operations - Gas Monitoring and Regulations, Department of Petroleum Resources - DPR

17:50 **Networking Reception Welcome Speech by Bayegan Group**

18:00 - NETWORKING DINNER RECEPTION for ALL Participants & Speakers

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Summit Day 2 - 24 Oct 2018, Wednesday

- 09:00 Chairman's Welcome & Remarks
Mr. Ong Han Wee, Consultant, FACTS Global Energy
- 09:05 **The African LPG Market in Development**
Ghana
Mr. George Amoako-Adjei, Director of Commercial Operations, Ghana National Gas Company Ltd
- Kenya**
Mr. Peter Onasis Luchi Ochieng, Managing Director, Downstream, Hashi Energy Limited
- Nigeria**
Mr. Zayyanu Yabo Tambari, Asst. Chief Chemical Engineer, Gas Operations - Gas Monitoring and Regulations, Department of Petroleum Resources - DPR
- Uganda**
Mr. Emmanuel Mangeni, Director / Consultant, Ultimate Gas Professionals Limited
- 10:30 Refreshments & Networking
- 11:00 **Development of LPG Power Plants - Success Stories & Operational Experience**
Mr. Andrej Borgmästars, Senior Manager, New Market Segments, Wartsila Finland Oy
- 11:30 **Petrochemical demand for LPG - Feedstock markets/ economics; LPG vs. Naptha**
Mr. Ong Han Wee, Consultant, FACTS Global Energy
- 12:20 Discussion followed Networking Luncheon Reception
- 14:15 End of Summit

CUSTOMISED SPONSORSHIP OPPORTUNITY

Package available include Corporate, Exclusive Luncheon & Cocktail sponsor.
Exhibition / catalogue display can be arranged upon request.
Contact fiona@cmtsp.com.sg

"Tapping on Growing Markets & Emerging Applications"

The LPG market is currently in a period of transition; adapting to an environment of increasing supply, growing importance of the petrochemical markets, lower global price spreads and depressed freight rates.

Supply has increased in the last few years from both the US, as a result of Shale Gas exploration, as well as from the Middle East as players maintain global market share and production projects come to fruition.

In terms of propane demand, Asia remains a key output for trade volumes driven mainly by the onset of new PDH facilities, particularly in China and Korea. Furthermore, the narrowing of the spread has resulted in arbitrage economics becoming unfavourable creating a challenging trading environment.

At the same time, the VLGC fleet has increased substantially, depressing freight rates to levels around or below OPEX costs. Combined with the decreasing price spread between the US and Asia, the oversupply of VLGCs on a ton-mile basis has forced many market players to realign their positions in the current market.

Gathering key commercial players from Asia, Europe, US and the Middle East, CMT's 12 LPGtrade Summit is a NOT TO BE MISSED event for all who are involved in the global LPG trade (production, procurement, trade and etc). Register NOW to attend with your team, to enjoy attractive early bird group discounts. Contact huiyan@cmtsp.com.sg today!

Key Highlights

- Growth from emerging LPG use in power generation & bunker fuel
- Petrochemical market dynamics & LPG-Naphtha feedstocks' competitiveness
- LPG vs LNG – A threat or co-exist partner?
- Import dominance from China & India + growth outlook
- South Asia + ASEAN – scope for growth in the residential/commercial sectors?
- Opportunities awaiting in Africa's LPG demand & production
- Middle East & Russia Far East's export updates
- US production outlook & rise of the Canadian Propane Export
- Future prospect of LPG shipping & seaborne trade

3 WAYS TO REGISTER

Online : www.cmtevents.com
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Tel : (65) 6346 9113

Separately Bookable Pre-Summit Workshop

22 Oct 2018, Monday (09:30 – 17:00)

LPG: From Simplicity to Complexity - "How to Navigate Changing Circumstances"

Aim: The workshop aims to examine the basic principles of the global LPG market, how it is dependent on the economics and market dynamics of oil/oil products, gas and petrochemicals markets. Through the workshop, we will also aim to provide the core tools and fundamentals that are required for any market player.

- 09:00 Registration
- 09:30 **Intro into the Global LPG Markets, Trading & Shipping**
- 10:00 **LPG 101: Understanding the LPG Market Fundamentals**
- 11:00 **The Key Conundrum: Introduction to LPG Pricing**
- 12:00 Workshop Luncheon & Discussion
- 13:15 **Crucial Changes of LPG Patterns: Fundamentals of LPG as Petrochemical Feedstock**
- 14:00 **Getting it from A to B: LPG Shipping**
- 14:30 **Money Matters: Key Economics of the LPG Market**
- 15:30 **Connecting the Dots: LPG Trading**
- 16:30 Putting it All Together & Debriefing

| Per Person Fee for Conference: | (USD) |
|--|----------|
| Regular Fee for 1 | 2295.00 |
| Register 3 or more to Save (per person) | - 500.00 |
| (Optional) Pre-Conference Workshop for Conference Attendee (22 Oct 2018, Monday 09:30 – 17:00) | 1095.00 |
| Workshop fee for Non-Conference Attendee | 1395.00 |

Program details published herein are confirmed as at 19/10/2018.

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