

CERI 2018 Petrochemical Conference

The Petrochemical Trilemma: Economics, Environment and Society

June 10-12, 2018 • Delta Hotels by Marriott Kananaskis Lodge • Alberta

Canada's petrochemicals industry faces unique challenges at a time when public scrutiny of fossil fuels has never been more intense. How will the industry respond to environmental concerns, manage risks associated with market, political and regulatory uncertainties and more clearly define the identity of the Canadian petrochemicals industry?

What role is coal playing as a petrochemical feedstock? Does Canada have the logistics capacity to support petrochemical growth? What are the short and long-term petrochemical demand and supply growth dynamics in North America and globally? Can we strike a balance between economic competitiveness and the impact of carbon management policies on the industry? How will technological and efficiency improvements impact the petrochemicals business?

How will the petrochemical trilemma of social, environmental and economic factors play out for the sector? Delegates will hear from North American subject matter experts who will weigh the opportunities against the risks associated with the development of this sector.

Sunday, June 10, 2018

8:30 – 10:30 am Brunch (Stewart Creek Golf & Country Club, Canmore, AB)

10:30 am Golf Tournament (Shotgun start) • Stewart Creek Golf & Country Club
Sponsored by The City of Fort Saskatchewan
Vepica



4:30 – 6:00 pm Conference pre-registration (Conference Foyer • Delta Lodge at Kananaskis)

6:30 pm Opening Reception (Boundary Ranch)
Sponsored by Rangeland Engineering Canada Corp.



7:30 – 9:00 pm Western BBQ Dinner and Golf Awards (Boundary Ranch)
Sponsored by NOVA Chemicals Corporation



Monday, June 11, 2018

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General Conference Sponsors: **Chemistry Industry Association of Canada**
Aecon Industrial
Alberta's Industrial Heartland Association
Wood Canada Limited
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7:30 am
Registration Opens

7:30 – 8:30 am
Buffet Breakfast (Rockies Dining Room)
Sponsored by Shell Canada Chemicals



8:30 am
Introductory Remarks by Conference Co-chair (Gold/Silver Room)
Allan Fogwill; President and Chief Executive Officer • Canadian Energy Research Institute

8:45 – 9:15 am
OPENING KEYNOTE ADDRESS
GLOBAL PETROCHEMICAL MARKETS OUTLOOK
Mark Eramo; Vice President, Global Chemical Business Development Energy & Chemical Markets ▪ IHS Markit

Session 1 (9:15 – 10:30 am)
Canada Considers its Options While the World Converts to Gas
As Canada sits on the sidelines, billions are being invested into U.S. petrochemical projects. With major new Canadian petrochemical projects still planned despite political and investment uncertainties, will Canada recover from its petrochemical false start? How do investment cycles influence current and future projects? What is the impact of programs such as the Accelerated Capital Cost Allowance?

Moderator: Ben Brunnen; Vice President Fiscal and Oil Sands ▪ Canadian Association of Petroleum Producers

Gulf Coast Petrochemicals Outlook
Kristine Klavers; Senior Vice President, Consulting – Americas ▪ Argus

Sarnia & Marcellus: A Petrochemicals Profile
Speaker TBA

The State of Western Canada's Petrochemical Industry
Mark Plamondon; Executive Director ▪ Alberta's Industrial Heartland Association

10:30 – 11:00 am
Networking Break
Sponsored by Port of Vancouver



Session 2 (11:00 am – 12:15 pm)
The Petrochemical Trilemma
The petrochemicals sector has been challenged with a range of environmental, societal and economic challenges. How are petrochemical proponents addressing growing concerns with plastic waste?
How will future technologies assist Canada's burgeoning petrochemicals sector as it looks to become a key contributor to Canada's GDP through job creation, environmental innovation, energy security and the transition to a low-carbon economy?
How have U.S. tax reforms shifted the competitive landscape for Canada? What are the legislative and trade issues and are Canadian producers currently at a disadvantage?
What are the costs and net impacts of Canada's unique climate levies and other environmental considerations?

Moderator: Mark Plamondon; Executive Director ▪ Alberta Industrial Heartland Association

Advances in Technical Innovation
David Mercer; Director, Process Technology ▪ Fluor Canada Ltd.

Levelling the Playing Field – A Discussion of the Impact of US Tax Reform on Canadian Competitiveness
David McLellan; Principal ▪ Ridgeway Strategic Consulting

Canada's Carbon Challenge: Chemistry's Contribution to the Low-Carbon Energy Transition
Isabelle Des Chênes; Executive Vice President ▪ Chemistry Industry Association of Canada

12:15 – 1:15 pm
Networking Luncheon (Rockies Dining Room)
Sponsored by Dow Chemical Canada ULC



Session 3 (1:15 – 2:30 pm)
The Big Picture

**Program and speakers subject to change*

May 15, 2018

Traditionally, the US has been the largest petrochemical producer, accounting for a fifth of total petrochemical sector oil consumption, with the Middle East being the second most important producer (representing 15% of global oil consumption for petrochemicals). The EU accounts for 14% of petrochemical oil consumption, China (13%), Korea (8%) and Japan (6%), where petrochemicals are largely produced from naphtha.

Is Canada's petrochemical sector well positioned to compete globally? Based on the short and long-term forecasts, the abundance of feedstock available in Alberta and British Columbia and the potential to adapt the existing logistics network for increased exports, what does the outlook for Canada's petrochemical industry look like on a global scale? Are the challenges in Western Canada the same as in Central Canada? Does the Marcellus production tidal wave raise the fortunes of petrochemical facilities in Ontario?

Moderator: Bill Whitelaw; President & CEO ▪ JWN Energy

Gas vs. Coal – The Impact of Coal as a Feedstock

Wenran Jiang; Director, Canada-China Energy & Environment Forum ▪ China Institute, University of Alberta

An Abundance of Methane – Benefit or Burden for Alberta and British Columbia?

Ines Piccinino; Assistant Deputy Minister, Oil and Gas Division ▪ BC Ministry of Energy, Mines and Petroleum Resources

Presentation topic TBA

Speaker TBA

2:30 – 3:00 pm

Networking Break

Sponsored by TBD

Session 4 (3:00 – 4:15 pm)

Team Canada

As Canada seeks to balance economic competitiveness, the impact of carbon management policies and protection of the environment and citizens, how can the petrochemicals industry lead by example?

Moderator: Dale Lunan; Contributing Editor, Americas ▪ Natural Gas World

The Balancing Act: What is the Key to Unlocking the Potential of the Industry?

Jamie Fisher; Director, Energy Exports ▪ AltaGas

Economic Competitiveness

Scott Shorey; Global Director, Petrochemicals ▪ SNC Lavalin

Duty to Consult – A Perspective on Petrochemicals

In Canada, the duty to consult and accommodate with Aboriginal peoples arises when the Crown contemplates actions or decisions that may affect an Aboriginal person's Aboriginal or Treaty rights. This duty arises most often in the context of natural resource development.

Speaker TBA

6:00 – 7:00 pm

CONFERENCE RECEPTION (Conference Foyer)

Reception sponsored by SNC-Lavalin



7:00 – 9:00 pm

DINNER AND KEYNOTE ADDRESS (Gold Room)

The Future of Trade in 140 Characters

Mr. Tom Clark; Chair, Public Affairs and Communications ▪ Global Public Affairs



Dinner sponsored by Inter Pipeline Ltd.

Tuesday, June 12, 2018

7:30 am

Registration opens

7:30 – 8:30 am

Buffet Breakfast (Rockies Dining Room)

**Program and speakers subject to change*

May 15, 2018

Sponsored by TBD

8:30 am

Introductory Remarks by Conference Co-chair (Gold/Silver Room)
Dinara Millington; Vice President, Research • Canadian Energy Research Institute

8:45 – 9:15 am

KEYNOTE ADDRESS

The Honourable Margaret McCuaig-Boyd; Minister of Energy ▪ Government of Alberta
Minister McCuaig-Boyd will provide an update on Alberta's Petrochemicals Diversification Program and highlight opportunities in the province's petrochemical value chain, specifically for upstream producers and downstream consumers. McCuaig-Boyd will also focus on how the government's investment in energy diversification will improve Alberta's competitiveness while building on traditional strengths in a way that makes sense for Alberta and investors.

Session 5 (9:15 – 10:30 am)

The Horizon of Opportunity

Several external factors will have significant impacts on Canada's petrochemical industry. A key pillar of Alberta's Climate Leadership Plan includes phasing out coal pollution. How will the increased demand for electricity be reconciled with the essential purposeful stranding of coal assets? Is there a potential opportunity to utilize coal for olefin production in Canada?

The rapid production and increasing adoption of electric vehicles in Canada will be transformative in many ways, not the least of which will be the electricity generation sector. What role will petrochemicals play in the transportation transition?

Are incentives provided at the most effective stage of development?

Moderator: Martha Hall Findlay; President and CEO ▪ Canada West Foundation

The Future of Ontario's Petrochemicals Industry

Don Fusco; Director, Government and Stakeholder Relations – Ontario ▪ Chemistry Industry Association of Canada

Executing the Opportunity

Amelie Delisle; Manager, Petrochemical Development ▪ Inter Pipeline Ltd.

Enhancing Alberta's Competitiveness for Petrochemical Development

Mark Morrissey; Director, Economic Development ▪ City of Fort Saskatchewan

10:30 – 11:00 am

Networking Break

Sponsored by Argus Media, Inc.



Session 6 (11:00 am – 12:15 pm)

The Devil is in the Details

How will construction companies and operating companies make sense of the legislation, regulations and economic challenges associated with the development of petrochemical infrastructure? While it will be important to understand industry challenges at a high level, it will be imperative to outline the fine details when billions of dollars in shareholder investments are on the line.

Moderator: David Podruzny; Vice President, Business and Economics and Board Secretary ▪ Chemistry Industry Association of Canada

Case Study #1: Project Implementation

Guy Lembach; Partner, Capital Projects Leader, Canada ▪ Deloitte Canada

Case Study #2: Utilizing Digital Services to Enhance the Design and Operation of Petrochemicals Facilities

Dan Minicucci; Principal Engineer ▪ Advisian, WorleyParsons Group

Case Study #3: Stage Gate Analysis – Time-based Construction vs. Cost-based Construction

Peter Findlay; Vice President, Canadian Energy Corporate Finance Strategy ▪ Ernst & Young Corporate Finance (Canada) Ltd.

12:15 – 1:15 pm

Luncheon Presentation (Rockies Dining Room)

Better Margins Through Lurgi Technologies: Challenges and Opportunities

Mr. Dirk Burghardt; Sales Director and Licensing ▪ Air Liquide Global E&C Solutions

Sponsored by Pembina Pipelines



Session 7 (1:15 – 2:30 pm)

Executive Panel Discussion

Sun Tzu's Art of War

**Program and speakers subject to change*

May 15, 2018

The ancient Chinese wisdom contained in Sun Tzu's Art of War is considered poetic by many. In fact, many of the concepts contained in this classic have practical applications which may be used to help determine strategies for business. Is the Canadian petrochemical industry equipped to adopt these business strategies? Join our panel of executives as they apply the following tactics to their business:

- *Know the Competition, Study the Competition*
- *Act Like a Leader, Think Strategically*
- *Have a Plan, Never Lose Sight of the Goal*

Moderator: Kendall Dilling; Vice President, Environment and Regulatory ▪ Cenovus Energy Inc.

David Chappell; Senior Vice President, Petrochemical Development ▪ Inter Pipeline Ltd.

Gerard Dyson; Regional Managing Director – Americas ▪ Advisian, WorleyParsons Group

Tyler Edgington; President and Hydrocarbons Director ▪ Dow Chemical Canada ULC

Rocky Vermani; Vice President, Olefins Feedstock ▪ NOVA Chemicals Corp.

Steve Zinger; Senior Vice President Chemicals ▪ PCI Wood Mackenzie

2:30 pm

Closing Remarks & Conference Adjournment

Conference Proceedings Webpage sponsored by Fluor Canada Ltd.

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