



2019 Petrochemical Conference Field of Dreams

WE'RE BUILDING IT, THEY'RE HERE.
~~IF YOU BUILD IT, THEY WILL COME.~~

June 9-11, 2019 • Pomeroy Kananaskis Mountain Lodge • Alberta

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Program Introduction

The Canadian petrochemical sector sits perched on the edge of opportunity as it weighs risks associated with the significant commitment required to make large project dreams a reality. The industry also teeters on the edge of transformational change due to availability of feedstocks, the shifting market, technologically disruptive changes to existing and future processes and products, and ever-more stringent social and environmental expectations.

Will access to significant feedstock from the liquids rich Western Canadian Sedimentary Basin alone be enough to provide investors with the confidence they need in a competitive international market?

Location, location, location. How are geographical advantages weighed when making FID? Location clearly provides an edge over the competition, but does location make or break the feasibility of a project?

How will local consumption of products and the transition from linear to circular economies impact the sector?

Golf Tournament – Sunday, June 9, 2019

9:00 – 11:30 am Brunch (Trent Jones Building, Kananaskis Country Golf Course)

10:03 – 11:11 am Split Tee Golf Tournament • Kananaskis Country Golf Course
Sponsored by Vepica



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

6:30 pm Opening Reception, (Trent Jones Building • Kananaskis Country Golf Course)
Sponsored by Fluor Canada Ltd.

7:30 pm Alberta – Under Construction
Michele Evans, Assistant Deputy Minister
Economic Development • Government of Alberta



7:45 pm Gala Dinner and Golf Awards
(Trent Jones Building • Kananaskis Country Golf Course)
Sponsored by Fluor Canada Ltd.

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Program Day 1 – Monday, June 10, 2019

7:30 am

Registration Opens

7:30 – 8:30 am

Buffet Breakfast (Rockies Dining Room)

Sponsored by Nautical Energy Ltd.



8:30 am

Opening Remarks – Allan Fogwill; President and Chief Executive Officer • Canadian Energy Research Institute (Olympic Ballroom)

8:45 – 9:15 am

GLOBAL PETROCHEMICAL MARKETS OUTLOOK: Adding Alberta to the New Capacity Mix for the 2020's

New petrochemical capital investment planning for the 2020's is well underway and the recent question of "Why not Alberta?" has now become "Why not **more** in Alberta?"

Mark Eramo, Vice President, Global Business Development – OMDC • IHS Markit

Session 1 (9:15 – 10:30 am)

Much "ado" about methane? A Feedstocks Discussion

Canada ranks as a top producer of natural gas. The main component of natural gas is methane while generally less than 5 percent of natural gas is ethane and propane – key feedstocks needed for petrochemical production. How can we innovate to find additional uses for methane?

What is the capacity for existing and planned fractionation facilities? Will availability of ethane feedstock limit new builds?

Additionally, how can we ensure that petrochemicals and petrochemical products move efficiently through existing transportation networks? What changes to current infrastructure might be required? Already planned?

Moderator: Mark Pinney, Manager, Natural Gas and Transportation • Canadian Association of Petroleum Producers

Roadmap to Recovery: Reviving Alberta's Natural Gas Industry

Barbra Korol; Executive Director • Alberta Department of Energy

Market Access Certainty

Bernard Lachance, Director of Marketing, Sales and Marketing, Petroleum & Chemicals • CN

An Alternative Vision for Canadian Natural Gas

Mark Tonner, President & CEO • Nautical Energy Ltd.

Project Execution: Aligning Schedules and Budgets

Scott Shorey, Global Director-Petrochemicals, Oil & Gas • SNC-Lavalin

10:30 – 11:00 am

Networking Break

Sponsored by Wood



Session 2 (11:00 am – 12:15 pm)

Skip the "Value Add" Jargon and Get to the Point

Talk of recently announced royalty credits intended to diversify Alberta's petrochemical industry has dominated recent discussions around resource diversification. To what degree have these incentives mobilized an already captive audience? Will they be enough to draw international interest and compete with the USGC? Can the momentum be maintained?

In addition to government incentives, how can disruptive technology help to better position Alberta through execution efficiency improvements which make it more competitive with the USGC? What role will digital strategy and execution play in helping to guide the petrochemical sector through its digital journey?

Moderator: Jordan Rumohr, Vice President, Business Development • Willowridge Construction

The Truth About Incentives

David A. McLellan, Principal • Ridgeway Strategic Consulting

Execution Efficiencies Through Disruptive Technology

Anbu Shanmugam, Engineering Systems Specialist • Wood PLC

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Ethane as A Strategic Molecule

Dave Tulk, Principal • Gas Processing Management Inc.

Data Driven Construction

Jamie Feuffel, Operations Manager • PCL Industrial Management Inc.

12:15 – 1:15 pm

Networking Luncheon (Rockies Dining Room)

Sponsored by Rangeland Engineering Canada Corp.



Session 3 (1:15 – 2:30 pm)

Customers

Where is the market for products like methanol, ammonia and polypropylene? From fuel to fertilizer, from medical equipment to household goods, the petrochemical industry provides products which enrich our everyday lives. The supply chain is comprised of complex links.

Canada has more than 43,000 Aboriginal businesses ready to help Canada compete and win. Aboriginal business is thriving and ready. But, for many reasons, Aboriginal businesses are underrepresented in the supply chains of most Canadian corporations.

Join the panel who will discuss their business, their customers, their outlooks for the future and what makes them choose to do business where they did.

Moderator: James (Jim) Brown, Fellow • Canadian Energy Research Institute

Why Midstreamers Are Pursuing Petrochemicals

Kevin Jagger, Vice President, Petrochemicals • Pembina Pipeline Corporation

Additional Ammonia Production Capacity in Canada – Does it Make Sense?

Steve Weber, Vice President, Refining and Petrochemicals • Argus Media

Supply Change Through Supply Chain

Jean Paul (JP) Gladu, President and CEO • Canadian Council for Aboriginal Business

2:30 – 3:00 pm

Networking Break

Sponsored by NOVA Chemicals Corporation



Session 4 (3:00 – 4:15 pm)

Protecting the Environment and the Petrochemical Brand – Why Both are Important

Public perception and attitudes about the petrochemical sector present challenges to the sector. These challenges are not unique to those at the forefront of the conversation. Issues associated with brand and the environment impact the full supply chain; upstream producers, midstream transport and downstream producers/consumers.

Social media is rich with accusers quick to blame the sector for their contribution to floating islands of trash in our oceans but what really lies at the heart of the issue? What are the facts?

Moderator: Debbie Pietrusik • Northern Alberta Institute of Technology

Sustainably Managed Plastics

Bob Masterson, President and Chief Executive Officer • Chemistry Industry Association of Canada

Downstream Issues for Upstream Producers?

James Baldwin, Leader, Responsible Care • NOVA Chemicals Corp.

The Next Generation: A Look Through Fresh Eyes

Sarah Vandaiyar, President & CEO, Young Pipeliners Association of Canada, Project Engineer – TransCanada (Seconded to CEPA)

Single-Use Plastics and Plastic Waste – The Connection, the Disconnect, and the Opportunity

Neil Antymis ICD.D, CPA/CGA, Director • Canadian Beverage Association

6:00 – 9:00 pm

CONFERENCE RECEPTION, DINNER AND KEYNOTE ADDRESS (Olympic Ballroom)

Times They Are a Changin': Federal Election Outlook

Mr. Tom Clark, Chair, Public Affairs and Communications • Global Public Affairs

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Program Day 2 – Tuesday, June 11, 2019

7:30 – 8:30 am

Buffet Breakfast (Rockies Dining Room)

8:30 am

Introductory Remarks by Conference Co-chair (Olympic Ballroom)
Dinara Millington; Vice President, Research • Canadian Energy Research Institute

8:45 – 9:15 am

KEYNOTE ADDRESS (Olympic Ballroom)

Coming Into The Home Stretch of Canada's Election Super Power
Mr. Randy Pettipas, CEO • Global Public Affairs

(9:15 – 9:45 am)

Infrastructure Investment Plans for the Port of Vancouver to Respond to Increased Customer Demand for Import and Export Services

Doug Mills; Senior Account Representative, Trade Development • Vancouver Fraser Port Authority

(9:45 – 10:15 am)

NEW CERI Study: Supply Costs and Emission Profiles of Petrochemical Products in Selected Hubs

Allan Fogwill; President and CEO • Canadian Energy Research Institute

This study quantifies GHG emissions from petrochemical processes and evaluates supply costs of products from various processing pathways and petrochemical hubs. The hubs assessed are located in Alberta, Ontario, Texas (US), and South Korea. In assessing supply costs and emission profiles, CERI examined 5 feedstock types, including ethane, propane, ethane/propane mix, LPG, and naphtha.

10:15 – 11:00 am

Networking Break & Hotel Checkout

Sponsored by Vancouver Port Authority



Session 6 (11:00 am – 12:30 pm)

EXECUTIVE PANEL DISCUSSION

The Long Game

Today's environment of regulatory hurdles, social opposition and an increasingly competitive global market demands that petrochemical players develop a keener eye for veiled business opportunities and hone their ability to anticipate shifting timelines.

While doing all of that, focus on the actual business at hand – turning a profit for shareholders.

Join our Executive Panel as they discuss past project challenges and the future application of lessons learned.

Moderator: Chancellor Deborah Yedlin • University of Calgary

Dow Chemical Canada ULC

Tyler Edgington, President

Inter Pipeline

David Chappell, Senior Vice President, Petrochemical Development

IHS Markit

Dave Witte, Senior Vice President, IHS Markit Division Head – Energy & Natural Resources

NOVA Chemicals Corporation

Rocky Vermani, Vice President - Olefins Feedstocks

12:30 – 1:30 pm

Networking Lunch & Conference Close (Rockies Dining Room)



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