## Tuesday, 26 June 2018

**Workshop: Olefins and Polyolefins: Feedstocks, Cost Competitiveness, Market Dynamics, Technologies and Trade**

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<td>8:00 am</td>
<td>Registration and Welcome Refreshments</td>
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<tr>
<td>8:30 am</td>
<td>General Session</td>
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<tr>
<td>12:00 pm</td>
<td>Lunch</td>
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<tr>
<td>1:00 pm</td>
<td>Technology, Cost Competitiveness, Market Dynamics and Trade</td>
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<td>5:00 pm</td>
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Wednesday, 27 June 2018

7:00 am  **Registration, Continental Breakfast and Networking**

8:30 am  **Welcome Remarks**

Lyn Tattum, Vice President, IHS Markit

8:35 am  **Energy and Feedstocks: The Next Chapter?**

Matthew Thoelke, Senior Director, Olefins and Derivatives, EMEA, IHS Markit

Recent volatility in oil markets and the resulting pressure on cost have once again changed the landscape for polyolefins players. Investors in low cost producing regions have been relaxing as their advantage increases as do their expected returns. Naphtha-based crackers operators have seen costs rise at a time when the ability to pass through those increases has lessened. This paper will look at what it is that has driven the volatility in energy and what are the impacts for today and in the future.

9:00 am  **Global PE: Where Is It Heading?**

Nick Vafiadis, Vice President, Plastics, IHS Markit

9:25 am  **Global PP Market Outlook**

Kevin Longworth, Associate Director, Polyolefins, IHS Markit

The global PP market is forecast to see long term sustained demand growth, and yet apart from China’s push for self-sufficiency, there has been a distinct lack of investments globally to satisfy the new supply requirements. Despite the shale gas revolution in the United States their investments have been mainly focused on the ethylene and derivative markets. The Middle East saw phenomenal PP capacity growth in the decade after the millennium, but with only one new plant slated to start before 2020 there has been a definite slowdown in capacity developments in the region. This begs the obvious question: Why have capacity developments slowed in advantaged feedstock regions? With PP demand steaming ahead what is the outlook for PP prices and margins in the years ahead? In this presentation we focus on the global outlook for PP in the coming years looking at future investments, the ever evolving supply/demand developments and their impact on prices and margins.

9:50 am  **European Polyolefin 2.0?**

Kaushik Mitra, Director EMEA Polyolefins Market Research, IHS Markit

A few years back if anyone spoke about investment in new Polyolefin capacities in Europe, it would be considered irrational and even counterintuitive as it was in the midst of a crushing recession, overcapacity and capacity closures. But since last one year we have heard some announcements by leading companies on green or brownfield expansions, so what has changed recently, what is driving such strategies and what are the prospects of these investments materializing? Though market currently is well balanced and robust, future could pose challenge and create opportunity coming from imports, recycling space. However, some fundamental shifts in the industry and fresh strategic perspective of leading companies are leading to re-rating of Europe as investment destination. What are the risks,
challenges, opportunities and scenarios underpinning the future investment and what it means for the Polyolefins industry in Europe.

10:15 am **Q and A/Panel Discussion**

Moderator: Lyn Tattum, Vice President, IHS Markit

10:30 am **Networking Break**

11:00 am **Plastics in the 21st Century: A Global View**

Jim Seward, Chairman, World Plastics Council; Vice President JV and International Business, LyondellBasell

11:25 am **Plastics in Europe: Addressing Challenges of a Circular Economy**

Karl Foerster, Executive Director, PlasticsEurope

This presentation will address the issue of sustainability of the plastics industry in light of environmental sustainability requirements, as well as new policy from Europe to move to 55% recycled content by 2025. How will these changes impact the plastics industry? Where are the specific challenges and opportunities?

11:50 am **China's Ban on Scrap Imports: How Will It Impact Polyolefins?**

Martin Wiesweg, Senior Director PS, EPS and PET, IHS Markit

12:15 pm **Q and A/Panel Discussion**

12:30 pm **Networking Lunch**

2:00 pm **Trade and Supply Chain Panel: Impact of New Capacity Wave on Global Polymer Trade, Logistics and Distribution**

Moderator: Martin Wiesweg, Senior Director PS, EPS and PET, IHS Markit

Panelists:
- Sanjay Moolji, Global Director – New Business Development, Tricon Energy Ltd.
- Marc Mertens, Global Category Lead Plastics, desSter bvba
- Jürgen Rachor, Senior Expert, Supply Chain Management, McKinsey

2:30 pm **Panel discussion/Q and A**

2:50 pm **Networking Break**

3:20 pm **REACH: A Major Driver of Plastic Additives in the EU and Beyond**

Uwe Löchner, Principal Analyst, IHS Markit

3:35 pm **Strategic Dialogue: NIAS in Food Packaging**

Panelists:
- Hartmut Siebert, Technical Marketing Manager/Packaging, Clariant Plastics and Coatings AG
- Sander Koster, Group Leader, Packaging Food Safety, Nestle S.A.
4:20 pm  **Improving Profitability of Low VOC Grades**

Catherine Malchaire, Technical Sales Manager Europe, Business Unit Polymer Stabilizers, Songwon International AG

The reduction of Volatile Organic Compound (VOC) for automotive interior compounds has become a major topic with increasingly stringent norms. In response to this trend, resin producers introduced low VOC grades but the profitability of these grades have not met expectations. One way to improve improftability is to slow down the pelletization step after the polymerization of PP but this raises the cost of the automotive resin. This presentation will outline an alternative route via special additives, which maintains the low VOC grade while allowing faster pelletization.

4:35 pm  **Enabling Polyolefins Solutions for the Circular Economy**

Andrea Landuzzi, Technology Solutions - Polymer Additives, Global Marketing Director, Solvay

As announcements of additional polyolefin capacity and images of plastic pollution share the headlines globally, the need for a differentiated and sustainable plastic industry is emerging. The transition from a linear (take-make-dispose) to a circular economy (recover-innovate-reuse) represents a shift to ensure industry sustainability and value creation. This presentation will discuss examples of how purpose-driven product development leveraging high performance stabilizers can enable the polyolefins industry to become more economically and ecologically sustainable.

4:50 pm  **Purging Volatiles in Polyolefins Processing**

Brian H. Pittenger, Vice President, Jenike and Johanson, Inc.

5:05 pm  **Q and A/Panel Discussion**

5:20 pm  **Day One Concludes**

6:00 pm  **Networking Reception**
Thursday, 28 June 2018

8:00 am  **Registration, Continental Breakfast and Networking**

8:30 am  **Welcome Remarks**
Nick Vafiadis, Vice President, Plastics, IHS Markit

8:35 am  **Recycling as a Growth Platform**
Jim Seward, Chairman, World Plastics Council; Vice President JV and International Business, LyondellBasell

8:50 am  **Consumer Packaging Trends and Sustainability**
Izabela Lomacka, Global Procurement Director, Closures, Labels, Shrink Film, The Coca-Cola Company, Cross-Enterprise Procurement Group

9:05 am  **Turning Waste into Usable Raw Materials**
Enrico Dolce, Product Development and Sales Manager, Fater AHP Recycling Business Unit

9:20 am  **Impact of the Global Sustainability Agenda on Operations and Processes**
Antonio Bassi, Petrochemicals Product Manager, XSIGHT Division, Saipem

9:35 am  **Turning Plastic Waste into Building Blocks**
Don Thomson, President, The Center of Regenerative Design and Collaboration

9:50 am  **Shaping the Circular Economy in Polyolefins**
Günter Stephan, Head/Circular Economy, Borealis

10:05 am  **Q and A/Panel Discussion**

10:30 am  **Networking Break**

10:55 am  **Catalysts and Process Technology: Innovation for Profitable Growth**
Moderator: Just Jansz, Founder and Managing Director, Expertise Beyond Borders BV
- Maurits van Tol, Senior Vice President, Innovation and Technology, Borealis
- Martijn Vogelzang, Director - Licensing, SABIC
12:00 pm  **Q and A/Panel Discussion**

Moderator: Just Jansz, Founder and Managing Director, Expertise Beyond Borders BV

12:15 pm  **Networking Lunch**

1:35 pm  **A Collaborative Strategy for Delivering Solutions**

Lada Kurelec, Global Business Director Polypropylene Business, Petrochemicals, SABIC

The mega trends present the world with many challenges, pushing industries to change rapidly to adapt new technological advances, changing consumer needs, volatile raw material prices, new feedstock, and new manufacturing trends. SABIC will outline how innovation and collaboration can help industries to drive forward and by delivering new ideas, new solutions helping respond them to challenges and support circular economy in this competitive landscape.

1:50 pm  **PE and PP: Despite Differing Outlooks Polyolefins Innovation Thrives**

Maria Ciliberti, Vice President, Marketing and New Business Development, Polyolefins, Borealis

The PE and PP markets are undergoing significant changes. The differing outlooks and dynamics between these two polyolefins will be presented. In spite of a long history of uses for polyolefins, innovation thrives. New solutions based on polyolefins materials for the energy, packaging, consumer products, pipe and automotive industries will be presented highlighting that the future for polyolefins remains bright.

2:05 pm  **3D Printing in Lightweighting Automotive Components**

Gareth Lamb, Senior Consultant, IHS Markit

2:20 pm  **Q and A/Panel Discussion**

2:35 pm  **Networking Break**

3:05 pm  **Current Trends of Flexible Packaging**

Guido Aufdemkamp, Executive Director, Flexible Packaging Europe

This presentation will give an introduction into flexible packaging markets and shows how global megatrends impact the markets in Europe and worldwide.

3:20 pm  **2018÷2030 European Polyolefins and Circular Economy: A Challenging Cohabitation**

Joao Paulo de Sousa, Marketing Intelligence Manager, VERSALIS and Andrea Verazzi, Marketing Manager Polyethylene, VERSALIS

3:35 pm  **How the Need for a Circular Economy Influences Packaging and Recycling**
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<tr>
<td>3:50 pm</td>
<td>Packaging Sustainability: Fact Vs Fiction</td>
<td>Gerald Rebitzer, Sustainability Director, Amcor Flexibles</td>
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<tr>
<td>4:05 pm</td>
<td>Ethylene Copolymers for Sustainable Packaging</td>
<td>Karlheinz Hausmann, R and D Fellow, Sustainability Technology Leader ECP, Dow</td>
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<td>Packaging and Specialty Polymers</td>
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<td>Ethylene Copolymer are mostly copolymers of ethylene with other polar comonomers that can be either reactive or non reactive. These gives new functionalities to polyethylene and provide significant property enhancement. These polymers can be used as modifiers, adhesives, protective surfaces and in many other applications. This contribution will show how these polymers can contribute to sustainable packaging design through lightweighting by redesigning packages but also to make multilayer structures more circular by enhancing their recyclability in mechanical recycling streams. Examples will be given in both cases highlighting the unique, polar and reactive character of these polymers. In addition, we as a specialty ethylene copolymer producers can support customers in our Pack Studios in their developments with these polymers while striving to develop materials meeting the needs of our customers and their markets.</td>
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