



**PETROCHEMICALS**  
Key Issues & Strategy  
Workshop

**26<sup>th</sup> & 27<sup>th</sup> August 2014**

**London**

**G O I C**  
منظمة الخليج للاستشارات الصناعية  
Gulf Organization For Industrial Consulting

**International Chem**  
Creative Energy for Important Issues



## Introduction

The GCC petrochemical industry is moving vigorously to strengthen its position as a major petrochemical supplier. From around 50 million ton in 2004, it is now producing more than 100 million MT of petrochemicals. Its portfolio ranges from chemicals to fuel additives, polyolefin and aromatics. Current plans and future projects indicate that, by 2025, the GCC petrochemicals output's share in the world petrochemical market, will reach the level of 25%.

No surprise, the region is endowed with huge reserves of oil and gas resources. The last four decades has witnessed the establishments of strong chemical and petrochemicals that benefited, and continue to benefit, from the relatively low-cost feedstock. A wave of expansion plans and new projects are underway in the region and most are world scale projects.

## The Problem:

However, the growth and potentiality is being challenged currently. Recent economic crises and technological development in shale gas and oil, specifically in the US, coupled with the massive buildup of Chinese petrochemicals, are casting their shadows on the GCC petrochemicals development. The comparative advantage brought by the relatively low-cost of feedstock is being pressured by the size and the number of projects that have been committed. Expansions of power generation in the region due to continued population and wealth is also competing with petrochemicals on feedstock.

In addition to this, petrochemicals industry is a technology-driven industry, the need to update production processes and innovate cannot be overemphasized. Regional research and development capabilities need to be further strengthened through partnership and establishing its own facilities and programs. It is becoming evident that the major cooperation and investors need to continuously revisit their strategic directions to address these challenges. Such strategic direction will facilitate maintaining competitiveness and market lead.

## The Opportunity and Value Proposition:

It is becoming an essential to share thoughts on issues that are regional and global nature in order to optimize your

approach and speed the development pace. Joint brainstorming between GCC planners and producers will facilitate arriving at the best decision for your next move; new investment and expansions.

*GOIC and IeC has joined their efforts to provide a valuable platform for GCC public and private decision makers where strategic directions for the region's petrochemical industry can be debated and outlined.*

## The Workshop Objectives:

To provide a platform for GCC petrochemical decision makers, which will allow them to brainstorm together and which will help them to tackle their future challenges. By using their expertise in long term planning, they will be able to develop strategic options which will expand their petrochemical's industry effectively. By so doing they will further strengthen GCC's role in the world market and increase their contribution to the economic prosperity of the region.

## Scope of the Workshop:

The workshop will adopt the discussion format where the facilitators will provide each session with background information and lead the discussion on key issues and strategy. The following issues will be highlighted and discussed during the course of the two days.

- Overview of the GCC petrochemicals
- Petrochemicals: complexity of supply and demand.
- Strategic energy, feedstock and demand issues.
- Key regional issues for oil refiners.
- Advantage of feedstock.
- Advantage and disadvantage of producing petrochemicals from different feedstock.
- Strategic advantage of Gas.
- Key role of the key petrochemicals building blocks.
- Key issues impacting demand for petrochemicals major derivatives.
- Prices issues: The effectiveness of the key pricing mechanisms in petrochemicals
- Strategic challenges ahead.





## Who will be the participants?

It is expected that top management and senior staff from the GCC industry will be the core participants in addition to investors, senior advisors from both private and public sectors, and those who are consider close to the decision making process in the petrochemicals and related industries.

## Facilitators:

Senior Consultants from both IeC and GOIC.

## Deliverables:

The Workshop will make available to all participants the following:

- ❖ The organizers will provide all the participants with soft copy of all the materials presented during the workshop.
- ❖ Networking sessions will be organized throughout the two days to avail opportunities for participants to meeting with their counterparts and exchanging concerns and share experience.

## Program Agenda:

GOIC Petrochemicals Strategic Workshop Agenda:

1. Introduction including GOIC overview of the GCC Petrochemical industry
2. Upstream of Petrochemicals – strategic energy , feedstock and demand issues
3. Upstream of Petrochemicals – key regional issues for oil refiners
4. Key source of Petrochemicals – successful investment in steam crackers depends on feedstock and derivative advantage
5. What are the key advantages and disadvantages of producing Petrochemicals from sources other than the steam cracker?
6. The strategic advantage of gas.
7. What is the key role of the key Petrochemical building blocks?
8. What are the key issues impacting demand for their major derivatives?
9. How effective are the key pricing mechanisms in petrochemicals marketing and trading?
10. The strategic role of the key global players
11. Review of the workshop and the strategic challenges ahead

## Date & Venue:

Date held : 26<sup>th</sup> & 27<sup>th</sup> August 2014

## Venue :

*Rosewood London : Just steps from Covent Garden, Rosewood London: Just 5 minutes' walk from Covent Garden and Oxford Street.(Special rates are available for participants)*

## BIOGRAPHIES



John Keeley  
Senior VP

John Keeley, spent 35 years with Shell Chemicals in the UK, the Netherlands and Germany. He held senior management positions in the base chemicals, polyurethane and solvents businesses in the UK, The Netherlands and Germany, and from 1996 was responsible for Shell's European aromatics business. His career has given him considerable commercial and international experience of general business management within the chemical industry.



Bob Townsend  
Senior VP

Bob Townsend, SVP, specializes in the lower olefins, principally ethylene and propylene, and in polyolefin plastics. Over the past 10 years, Bob has particularly focused in the M&A area, and has recently provided independent appraisals of feedstock security and economics for a range of clients, including Basell, Shell and Haldia Petrochemicals. Previously, Bob worked for Shell chemicals, covering a range of commercial roles in basic petrochemicals and polyolefins, including as Business Manager,



Ismail Elshafei  
Advisor B D

Ismail El Shafei, Chemical Engineering graduate with a Master Degree in energy from the University of Pennsylvania, U.S.A. He has more than 20 years of experience in GCC Chemical and Petrochemical sector. He has developed a number of Petrochemical downstream opportunities that are being considered for implementation.

Ismail El Shafei has held a number of senior technical positions at Gulf Organization for Industrial Consulting "GOIC". He is currently leading a multi-client studies on Aromatics and implementation number of bankable studies on Petrochemical Projects.



## Registration Form

Name:

Job Title:

Company:

Department:

Mailing Addresses

Postal Code:

City:

Country:

Phone:

Fax:

E-mail Address:

Do you like to get future Events calendar?

Yes

No

### Fees :

GP 2000 this covers;

- Copy of Presentations
- Breaks & Lunch
- Networking Session

Payment Methods:

- Send Invoice (Purchase Order must be received in advance)  
Purchase Order #
- Cheque (payable to the GOIC) or Bank Transfer  
Beneficiary Name: GOIC

IBAN: QA92 QNBA 0000 0000 0013 0487 0700 1

SWIFT CODE: QNBAQAQA

QATAR NATIONAL BANK, P. O. BOX: 1000

DOHA - QATAR

Credit Card  Visa  Master Card  American Express

Card #

Exp. Date:

Cardholder Name:

Signature:

### Enquiry & Registration

Ismail El-shafei

Business Development Consultant

Department -SG Office

PO Box : 5114, Doha - Qatar

Tel : +974 4485 8834

Tel : +974 4485 8888

Fax: +974 4483 1465

Email: shafai@goic.org.qa

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Gulf Organization for  
Industrial Consulting

GOIC

منظمة الخليج  
للاستشارات الصناعية

www.goic.org.qa



goic@goic.org.qa

## Program

# GOIC Petrochemicals Strategic Workshop

August 26/27 2014

### Time Table Day – 1

Day 1	
08:30 – 09:00	Registration
09:00 – 09:10	Welcome address HE Mr. Abdul Aziz A Al Ageel
09:10 – 09:30	Overview GCC Petrochemical Eng. Ismail El Shafei
09:30 – 10:15	Upstream - Strategic Energy, Feedstock and Demand Issues
10:15 – 11:00	Upstream - Key Regional Issues for Oil Refiners
<b>11:00 – 11:30</b>	<b>Networking &amp; Refreshment.</b>
11:30 – 12:15	Key Resources of Petrochemicals – Successful Investment in Steam Crackers depends on Feedstock and Derivative advantage
12:15 – 13:00	Advantages and Disadvantages of Producing Petrochemicals from sources other than the steam cracker?
<b>13:00 – 14:15</b>	<b>Lunch</b>
14:15 – 15:15	The Strategic Advantages of Gas
15:15 – 16:00	The Key Role of the Key Petrochemical Building Blocks? (Part 1 Olefins)
<b>16:00 – 16:30</b>	<b>Networking &amp; Refreshment.</b>
16:30 – 17:15	The Key Role of the Key Petrochemical Building Blocks? (Part 2 Aromatics)

### Time Table Day – 2

Day 2	
09:00 – 09:45	Review & Introduction to Day 2
09:45 – 10:30	The Key Issues Impacting Demand for the Major Derivatives (Part 1)
10:30 – 11:15	The Key Issues Impacting Demand for the Major Derivatives (Part 2)
<b>11:15 – 11:45</b>	<b>Refreshment.</b>
11:45 – 12:30	The Effectiveness of the Key Pricing Mechanisms in Petrochemicals Marketing and Trading?
12:30 – 13:15	The Strategic Role of the Key Global Players
<b>13:15 – 13:45</b>	<b>Refreshments</b>
13:45 – 14:30	<b>IeC and GOIC</b> Interactive Review of Strategic Middle East Regional Issues and Opportunities
<b>14:30 – 15:00</b>	<b>Close and Lunch</b>