



**ADI Forum**  
OIL & GAS • ENERGY • CHEMICALS

Houston, Texas  
January 15, 2020  
[www.adi-forum.com](http://www.adi-forum.com)





# ADI Analytics

OIL & GAS • ENERGY • CHEMICALS  
CELEBRATING 10 YEARS

ADI Analytics is a consulting and advisory firm specializing in oil and gas, energy, power, chemicals, and industrials.

Founded in 2009, ADI has completed over 400 projects for more than 100 clients including ExxonMobil, Shell, Chevron, ConocoPhillips, Saudi Aramco, Schlumberger, Phillips 66, Reliance, BASF, LyondellBasell, GE, Honeywell, Siemens, KKR, and U.S. Department of Energy.

In late 2017, ADI acquired the assets of Chemical Market Resources expanding its consulting, research, and advisory expertise in chemicals, petrochemicals, polymers, and plastics.

We help clients with market research, strategic planning, competitive benchmarking, and technology assessments along with many other consulting services. In addition, ADI offers several subscription-based research, intelligence, data, and analytics products.

Our growing team includes chemical and petroleum engineers, economists, MBAs, and PhDs with extensive domain expertise in oil and gas, energy, power, and chemicals. We differentiate ourselves through deep, field-based industry expertise; proprietary analytics; and client-centric, flexible delivery models.

[www.adi-analytics.com](http://www.adi-analytics.com)





## Welcome to the 2020 ADI Forum!

North America will soon be more of an energy exporter than a consumer. Production from our oilfields is finding its way through the value chain as well as around the world in the form of oil, gas, LNG, LPG, ethane, and, even ethylene and polyethylene.

In such a world, focusing exclusively on your business silo whether it's Permian, pipelines, LNG, or LPG is inadequate and can lead to missed opportunities. Our industry's fortunes today are more dependent than ever on understanding the entire value chain.

Facilitating that comprehensive, strategic understanding of the entire oil and gas value chain is why we host the ADI Forum.

Today, over seven panel sessions, more than 20 speakers will help you get current on upstream, midstream and NGLs, downstream, LNG, power, and petrochemicals. More importantly, you will connect the dots across these segments for a strategic view of the oil and gas value chain and how it impacts your business.

Each panel session will begin with context using insights from ADI's research and consulting work followed by an insightful dialogue with industry leaders. We welcome your active participation with questions and comments today.

Thank you for joining us!



**Uday Turaga**  
*Forum Chair*



**Ron Sills**  
*Forum Vice-Chair*



**Faiza Tanvir**  
*Forum Producer*





## Agenda

**7:30 am**    **Registration and Breakfast**

**8:15 am**    **Welcome**

*Uday Turaga, ADI, CEO*

**8:30 am**    **Keynote Presentation**

*Chris R. Chandler, Plains All American, Executive VP and COO*

**9:10 am**    **The Outlook for Oil and Gas in 2020**

*Uday Turaga, ADI, CEO*

**9:50 am**    **Panel 1: Upstream and Supply**

*Jonathan Crane, Shell, VP, Wells Digital Deployment*

*Helen Currie, ConocoPhillips, Chief Economist*

*Charles Njuguna, Deep Down, CEO*

*Utkarsh Gupta, ADI, Analyst*

**10:35 am**    **Break**

**10:55 am**    **Panel 2: Midstream and Natural Gas Liquids**

*John Powell, Crestwood Equity Partners, SVP, CCO, NGLs*

*Eric Hazeldine, Quorum Software, EVP & Midstream SME*

*Brandon Johnson, ADI, Project Manager*

**11:40 am**    **Lunch**

**12:40 pm**    **Panel 3: Downstream Oil and Gas**

*Horace Hobbs, Phillips 66, Chief Economist*

*Neville Fernandes, Neste, Manager, Renewable Jet*

*Swati Singh, ADI, Analyst*

*Uday Turaga, ADI, CEO*





**1:25 pm Panel 4: LNG Markets**

***Lisa Leland**, Annova LNG, SVP, Gas Supply  
**E. Scott Chrisman**, Sempra LNG, Former CCO  
**Uday Turaga**, ADI, CEO*

**2:10 pm Dessert and Coffee****2:30 pm Panel 5: Petrochemicals**

***Gregory Dolan**, Methanol Institute, CEO  
**Chris Mudd**, SGCE, CEO  
**Panuswee Dwivedi**, ADI Chemical Market Resources, Analyst  
**Ron Sills**, ADI, Advisor*

**3:15 pm Panel 6: Power**

***Mark Herrmann**, NRG Energy, VP, Commercial Operations  
**Thorsten Dradrach**, MAN Energy Solutions, Head, Power  
Region, Americas  
**Eric Carlos**, SoEnergy International, Sr. Executive Advisor  
**Uday Turaga**, ADI, CEO*

**4:00 pm Break****4:15 pm Panel 7: Energy Transition**

***Reinaldo Bermudez**, MAN Energy Solutions, Exec. Dir.  
Turbomachinery Sales  
**Roy Hartstein**, Responsible Energy Solutions, Managing Director  
**Richard Hyde**, One Future, Executive Director  
**Uday Turaga**, ADI, CEO*

**5:00 pm Adjourn and Cocktails**



## Speakers



**Reinaldo Bermudez** has over 22 years of experience in the field of turbomachinery working primarily in compression and power transmission equipment sales. Bermudez joined MAN Energy Solutions in 2011 as an Account Manager and since 2015 he has served as their Executive Director for Turbomachinery New Equipment Sales for North America. Prior to MAN, he was Senior Sales Engineer of variable speed drives and power transmission components at Voith Turbo North America and an aftermarket coordinator at JCI-York Process Systems. Bermudez holds an Industrial Engineering degree from the University of Houston.



**Eric Carlos** is the Senior Executive Advisor at SoEnergy International. He's also the founder of Audax Global Energy. Prior roles include VP and Head of New Equipment Sales for the Americas at Dresser Rand, a Siemens company, and at Solar Turbines, where he held various positions in engineering, marketing, sales and service for 25 years in Europe, Asia, and Latin America. Carlos holds a degree in Electrical Engineering from the University of California, and an MBA from the University of Miami.



**Chris Chandler** is the Executive Vice President and Chief Operating Officer at Plains All American. He is responsible for their US and Canadian operations and engineering organizations. Chandler has more than 20 years of energy industry experience, joining Plains in 2018. Previously, he served in a number of leadership roles at Phillips 66, most recently as General Manager, Corporate Strategy, and prior to that as General Manager, Midstream Commercial and Business Development, as well as numerous leadership roles in refining. He has a bachelor's degree in Mechanical Engineering from the University of California - Los Angeles.



**E. Scott Chrisman** is a highly accomplished global marketing, commercial and business development executive with over 25 years of experience in the energy industry including LNG, midstream gas and chemicals. Chrisman held several executive positions at Sempra LNG including, most recently, as Chief Commercial Officer. Prior to Sempra Chrisman held various positions at Simmons & Company and ExxonMobil. He holds an MBA in Finance from Rice University and a bachelor's degree in Chemical Engineering from the University of Tulsa in Oklahoma.



**Jonathan Crane** is Shell's vice president, Wells Technology Deployment, Quality and Technical Services, since July 2012. Prior to this role, he was drilling manager in Norway, primarily executing the Ormen Lange Project, development lead for Shell's Draugen CO2 project in Norway, and Bonga South West in Nigeria, as well as head of development planning and economics. For the last 29 years, he has worked in a variety of wells-related roles throughout the Shell Group in Europe, the U.S. and the Middle East. Crane has bachelor's in Engineering from Durham University.







**Helen Currie** has over 25 years of experience in business, government and academia. She is the Chief Economist at ConocoPhillips, managing strategic planning initiatives, oversees long range plan development, and advises on investment analyses & political risk. At BG Group, she led the Americas Market Analysis research team, advised on M&A opportunities with Strategy & BD, and developed Gas and Power Trading strategies. Currie holds master's in Economics from the University of Washington, and PhD in Finance from Mississippi State University.



**Gregory Dolan** has held a variety of senior management positions with the Methanol Institute (MI) over the past 23 years. In June 2014, he was appointed as CEO of the global methanol industry trade association. He came to MI after spending a decade in a variety of public information positions in New York State, with the Department of Environmental Conservation, the Energy Research and Development Authority, and the Department of Transportation. Dolan holds a BA degree in Political Science from Boston University, and did extensive post graduate work in Political Communication at the State University of New York-Albany.



**Thorsten Dradrach** is currently the Head of Sales — Region Americas for Power Plants for MAN Diesel & Turbo. He is responsible for all commercial and sales aspects of the Americas power business. Before working for MAN, Thorsten held positions with Siemens in Germany, Russia, China, and Mexico. He has more than twenty years of experience in operations, project management, and business development at global facilities. Thorsten has a Business Administration degree from the University of Cooperative Education Karlsruhe.



**Neville Fernandes** has managed the market development, sales and marketing teams at Neste US, Inc., that successfully commercialized renewable diesel in the USA and Canada several years ago. Fernandes has held many roles in Neste including General Manager and President of Neste US, Inc., and he is now focusing his efforts on commercializing renewable jet fuel. Fernandes is passionate in his belief that sustainable, low-carbon, biofuels are an important contributor to the responsible management of greenhouse gases and to the fight against climate change. Fernandes has a bachelor's degree in Chemical Engineering from Princeton University and an MBA in Marketing from Schulich School of Business.



**Roy Hartstein** has over 30 years of leadership experience ranging across diverse responsibilities in the energy industry, from exploration / production to natural gas transmission including technical operations, corporate responsibility and environmental initiatives. Hartstein is the Managing Director at Responsible Energy Solutions. Prior roles include: Vice President of strategic solutions for Southwestern Energy, Director of strategic sourcing for Enron Corporation, 20 years of experience with Texas Eastern Gas Pipeline including technical operations leadership and Director of Purchasing. He holds degree in Civil Engineering and an MBA in Finance from Louisiana Tech University.





**Eric Hazeldine** is an account executive for Quorum, focusing on development and retention of strategic Quorum customer relationships in the midstream segment. Hazeldine has 20 years' experience delivering, sustaining, and improving energy-specific software applications. He has filled a variety of roles within Quorum, including project manager, product manager, practice area executive, and account executive. Prior to joining Quorum, Hazeldine was a Process Engineer with Flour. Hazeldine holds a Bachelor of Science degree in Chemical Engineering from Northwestern University in Evanston, Illinois.



**Mark Herrmann** is the VP of Commercial Operations for NRG. He leads the Structuring and Valuation Teams, heading commercial valuations for M&A, Corporate Development, and Asset Management. Projects supported include renewables, conventional generation, battery storage, and distributed solutions. He is also responsible for the Portfolio Analytics and Fundamentals Teams, supplying long term proprietary fundamental views for power, natural gas, coal, and emissions for all competitive U.S. markets. He has an MBA from Cornell University and a bachelor's in Economics, with a Finance concentration from Rutgers University.



**Horace Hobbs** is the Chief Economist for Phillips 66. He is primarily focused on long range planning and capital allocation for a global portfolio of downstream businesses including petroleum refining and marketing, chemicals and specialties, transportation, and midstream. He has spent his entire career in the downstream energy industry, primarily as a consultant, and as a start-up venture executive. He currently serves as Chairman of the American Petroleum Institute's Economics and Statistics Committee. Hobbs has a bachelor's degree in Chemical Engineering from University of Houston.



**Lisa Leland** has nearly 30 years of experience working with producers, consumers, and pipelines focusing on origination in the natural gas sector. At Annova LNG, she will secure a reliable and affordable natural gas supply for customers around the globe. Recently, Leland was a senior gas trader for CFE International, and has extensive experience in the Texas natural gas market. She also holds international experience in addition to Mexico, Singapore and Canada, before coming to the U.S. Leland holds a B.A. Degree from the University of Regina, Canada. She has the Canadian Securities Institute's Canadian Futures Examination Certification.



**Christopher Mudd** is a specialty chemicals operating executive with a record of success in creating, building, growing, and leading highly competitive mid-sized companies for U.S. and international markets. He has served in C-level roles at multiple private equity owned and public companies, most recently as CEO of SGCE and Juniper Specialty Products. Prior to that, he was President & COO of CSW Industrials. From 2003-2015, he was President & GM of Dexco Polymers. He began his career with The Dow Chemical, where he served in various roles. Mudd holds a bachelor's degree in Chemical Engineering from the University of Texas at Austin.







**Charles Njuguna** has over 20 years of international business experience, including various operational and financial management roles in the US, UK and Africa. Njuguna is the CEO of Deep Down Inc. The company focuses on complex deepwater and ultra-deepwater oil and gas production distribution system technologies and support services, connecting the platform and the wellhead. Njuguna held various executive positions at Deep Down since 2012. Njuguna has earned his MBA degree from the University of Texas at Austin.



**John Powell** is the SVP and head of Crestwood's Marketing, Supply & Logistics (MSL) Group. Powell joined Crestwood's predecessor company, Inergy LP, in 2002. Powell began his energy career with Koch Industries as Trading Risk Supervisor. He later worked as an NGL Trader for both PG&E Energy and Louis Dreyfus Energy Services. A Certified Public Accountant, Powell has a BS in Accounting from University of Florida. He received his Master of International Business from the Thunderbird School of Global Management. With more than 23 years of energy industry experience, Powell has a deep understanding of commodity markets and cycles, the global energy value chain, risk management, and finance.



**Uday Turaga** brings over 20 years of industry experience gained at ConocoPhillips, ExxonMobil, Booz & Company, and ADI Analytics. He specializes in corporate strategy, market research, economic analysis, competitive intelligence, and technology assessments with rich domain expertise spanning oil and gas exploration, production, and refining, coal and power, and chemicals. Turaga holds a PhD in fuel science from Penn State and an MBA from the UT Austin.



**Ron Sills** is an internationally recognized expert on energy conversion technologies in the natural gas/coal/biomass to products value chain. Prior roles include Gas Conversion Network Leader at BP, manager of Mobil's Research Planning & Evaluation Group, and member of the commercialization team of the Methanol-to-Gasoline process. Sills holds a PhD and M.S. in Chemical Engineering from MIT and a B.S. in Chemical Engineering from Columbia. He is the co-inventor for 10 patents.



**Brandon Johnson's** expertise at ADI Analytics includes technology assessments, competitive benchmarking, market size modeling, and risk analysis using Monte Carlo uncertainty analysis in the oil and gas, chemical, power generation, and mining industries. He has utilized these skills to understand the economics, investment attractiveness, and competitive landscape of the engineered pump, wet gas and multi-phase compressor, bearing, seal, and heat exchanger markets. He holds a B.S. in physics from Stephen F. Austin State University.





**Swati Singh** is an analyst with ADI Analytics leading its North American downstream market advisory team. Prior to ADI, she has interned with US African Bilateral Chamber of Commerce. Further, she has worked for various projects in Nepal including, KU Syngas project, Puwa-Khola Hydropower project, Nepal Electricity Authority. Swati holds MS in global energy management and MS in planning and operation of energy systems from University of Houston and Norwegian University of Science and Technology, and B.S. in mechanical engineering from Tribhuvan University.



**Utkarsh Gupta** is an analyst with ADI Analytics and brings experience in the oil and gas, refining, petrochemicals, reservoir management and drilling and production in the upstream sector. Prior to ADI, he was with Reliance Industries Limited. He is an expert market research professional who has used a mix of primary and secondary research to size segments, understand the economics, and competitive landscape of the crude, natural gas and NGL market. He holds M.S. in petroleum engineering from University of Houston, and B.S. in chemical engineering from BITS Pilani, India.



**Panuswee Dwivedi** is an analyst with ADI Analytics and ADI Chemical Market Resources. She brings experience in the oil and gas, reservoir evaluation and management, and drilling and production in the upstream sector. She is a research professional who has used a mix of primary and secondary research to size segments, understand the economics, and competitive landscape of the crude and natural gas, across the value chain. She holds M.Sc. in petroleum engineering from University of Houston, and B.Tech. in petroleum engineering from Pandit Deendayal Petroleum University, India, with internship experience in production engineering from Oil and Natural Gas Corporation, India



## 2020 ADI Forum Partners



GeoForce was founded in 2007 with the simple belief that the chaos and pain of field operations could be alleviated with technology. Since 2007, our mission has been to build the largest global network of connected field assets to provide operational intelligence to companies involved in field operations around the world.

Combining a cloud-based software platform with rugged GPS tracking devices and global satellite and cellular networks, GeoForce's Track and Trace solutions include efficient asset location and retrieval, rental invoice auditing, service delivery verification, inspection compliance, equipment maintenance alert, and a host of others.



## MAN Energy Solutions

MAN Energy Solutions SE, formerly MAN Diesel & Turbo SE, is the world's leading provider of large-bore diesel engines, gas engines and turbomachinery. Its product portfolio includes turbochargers, compressors, propellers, gas and steam turbines, and chemical reactors; and goods including marine propulsion systems, turbomachinery units for oil and gas, and process industries; and power plant solutions.

MAN Energy also offers spares, technical expertise or qualified repair assistance; equipment and installation operation and maintenance; and technical services. It manufactures four-stroke engines at its sites in Germany, France, and India; and builds two-stroke engines through licensees. The company operates as a subsidiary of MAN SE. MAN Energy is headquartered in Augsburg, Bavaria, Germany.





## 2020 ADI Forum Partners



CISTAR is the name of a newly funded National Science Foundation (NSF) Engineering Research Center (ERC). The acronym stands for Center for Innovative and Strategic Transformation of Alkane Resources. The ERC brings together researchers from five premier U.S. research universities and industrial collaborators from more than a dozen companies to focus on developing breakthrough solutions to more effective conversion of America's shale derived light hydrocarbon resources.

The center will focus on developing novel modular technologies that more efficiently convert the light hydrocarbons to advanced fuels and petrochemicals. These technologies will provide a bridge to a sustainable future where renewables replace shale resources as the hydrocarbon resources.



Quorum Software offers an industry-leading portfolio of finance, operations, and accounting solutions that empower our customers to streamline operations that drive growth and profitability across the energy value chain. From supermajors to startups, from the wellhead to the city gate, energy businesses rely on Quorum.

Designed for digital transformation, the myQuorum software platform delivers open standards, mobile-first design, and cloud technologies to drive innovation. We're helping visionary leaders transform their companies into modern energy workplaces.



## 2020 ADI Forum Partners



SoEnergy International (formerly Energy International) is a global energy services provider delivering customized solutions, including sale of energy, bridge and long-term power solutions, for a diverse array of organizations and industries worldwide. The company has world-class technical expertise and international infrastructure throughout Latin America, and is currently expanding into Europe, the Middle East, and Africa.

SoEnergy's services include the design, engineering, procurement, construction, installation, operation, and maintenance of large-scale bridge and long-term energy solutions for clients in need of base load electricity, peak shaving, distributed generation, supplemental power, and emergency stand-by power generation as well as industrial gas compression and pump stations.

## AlphaSense

AlphaSense provides a revolutionary AI-based market intelligence search engine for investment firms and corporations. Our platform combines clients' internal content with the world's most valuable business and market information including broker research, call transcripts, company reports, news and trade journals. Seamlessly aggregating thousands of data sources, our groundbreaking semantic search engine captures variations in human language, accurately recognizing millions of business and financial terms and their synonyms, as well as companies, industries, topics and trends. Leveraging AlphaSense, corporations and financial firms make confident, quick decisions, enabling them to win in their markets.

Used globally by many of the world's top financial and corporate firms, AlphaSense is headquartered in New York with offices in London, Helsinki, India, and across the US.



## ADI Services and Offerings

Thank you for joining us at the ADI Forum. ADI's offerings are described below, and more is at [www.adi-analytics.com](http://www.adi-analytics.com) or by contacting us at [info@adi-analytics.com](mailto:info@adi-analytics.com) or +1 (832) 768-8806.

|                                       |  |
|---------------------------------------|--|
| <b>Consulting services</b>            | ADI helps operators, suppliers, and investors in oil & gas and chemicals with market research, strategy, competitive intelligence, cost / economic analyses, operational benchmarking, and technology assessments. |
| <b>Subscription research</b>          | Our subscription offerings include cutting-edge market intelligence and industry research through monthly or quarterly reports along with data and analytics, conference calls, and access to research teams.      |
| <b>Multi-client reports</b>           | ADI will regularly cover themes of topical interest to the oil and gas and chemical industries through multi-client reports that enable subscribers to catch up on a rapidly evolving industry trend.              |
| <b>Data, forecasts, and analytics</b> | ADI maintains and licenses data and analytics on supply, demand, pricing, assets, transactions, contracts, trade flows, companies, investors, and other key metrics and categories.                                |

## ADI Consulting Services

| Build strategy  | Drive sales and marketing  | Navigate markets  |
|---|--|---|
| <ul style="list-style-type: none"> <li>Research/analyze trends, markets, industry, players</li> <li>Identify/validate strategic options and M&amp;A ops.</li> <li>Define and test M&amp;A / investments via scenarios</li> <li>Profile competitive, policy, and other external risks</li> </ul> | <ul style="list-style-type: none"> <li>Size and analyze markets and market shares</li> <li>Identify and profile best segment / customer mix</li> <li>Optimize go-to-market and channel strategies</li> <li>VOC to refine offerings, pricing, and profit</li> </ul> | <ul style="list-style-type: none"> <li>Track industry / business trends for intelligence</li> <li>Identify key opportunities and external threats</li> <li>Develop strategies for opportunities and threats</li> <li>Develop models- and analytics-based forecasts</li> </ul> |
| Analyze financial issues  | Optimize procurement   | Accelerate innovation   |
| <ul style="list-style-type: none"> <li>Benchmark financial / investment performance</li> <li>Build valuation models to assess capital investment</li> <li>Develop robust business performance forecasts</li> <li>Analyze financials to find portfolio initiatives / ops.</li> </ul>             | <ul style="list-style-type: none"> <li>Build accurate view of procurement spend</li> <li>Benchmark procurement players and strategies</li> <li>Find category mgmt. and strategic sourcing ops.</li> <li>Define procurement spend optimization KPIs</li> </ul>      | <ul style="list-style-type: none"> <li>Assess current and new process technologies</li> <li>Estimate capex and opex for process technologies</li> <li>Identify process ops., needs, costs, benefits</li> <li>Plan market-backed R&amp;D / innovation strategies</li> </ul>    |





## ADI's Recent Consulting Engagements

| Upstream  | Downstream  |
|---|---|
| <ul style="list-style-type: none"> <li>Artificial and gas lift product strategy for an oilfield service company</li> <li>Shale plays and breakeven cost outlook for and upstream oil &amp; gas operator</li> <li>Offshore oil &amp; gas production scenario analysis for financial institution</li> </ul> | <ul style="list-style-type: none"> <li>U.S. West Coast refining strategy for a leading refiner</li> <li>IMO 2020 market impact scenarios for leading refining vendor</li> <li>Opportunities for digital innovation in refining for a leading industrial player</li> </ul> |
| Midstream   | LNG   |
| <ul style="list-style-type: none"> <li>Global ethane and NGL demand outlook for midstream operator</li> <li>Midstream asset due diligence support for private equity firm</li> <li>Capacity contracting outlook for a public midstream player</li> </ul>  | <ul style="list-style-type: none"> <li>Small-scale LNG market entry strategy for a leading operator</li> <li>LNG market research and market share analysis for an EPC firm</li> <li>Construction delays and impact analysis on U.S. LNG for investor</li> </ul>           |
| Petrochemicals  | Power   |
| <ul style="list-style-type: none"> <li>Linear alpha olefins market outlook for Middle Eastern chemical producer</li> <li>Due diligence on U.S. Gulf Coast terminal for a Japanese conglomerate</li> <li>Metallocene-based polyethylene market assessment for Asia chemical major</li> </ul>               | <ul style="list-style-type: none"> <li>Oilfield power market and technology choice analysis for an OEM</li> <li>Energy storage market assessment for a venture-backed startup</li> <li>Energy transition scenarios analysis for a leading oil major</li> </ul>            |



## ADI Downstream Market Advisory

ADI's Downstream Market Advisory is a subscription service for research, intelligence, analytics, and insights on North American downstream oil and gas markets. It helps subscribers identify and act on opportunities, trends, and risks in refining and petrochemicals with clear, concise market intelligence, analytics, industry fundamentals, project updates, and forecasts.

### How you benefit

- **Identify and take advantage of** trends, opportunities, and risks in refining/petrochemicals
- **Understand downstream markets** via trusted market intelligence and primary research
- **Make decisions confidently** with reliable updates on capital projects, M&A, and awards
- **Save time** with concise, easy-to-digest presentation reports with clean, compelling visuals
- **Access data** from ADI's proprietary analytics and tools for your models and analyses
- **Answer urgent questions immediately** with on-demand access to ADI's research team

### What you get

- Monthly PDF report on **downstream market performance**
- Monthly PDF report with **insights on topical theme**
- Monthly spreadsheet with **market data and analytics**
- Quarterly call for **interactive discussion on research**
- On-demand phone / e-mail **access to research team**
- Complimentary access to the **annual ADI Forum**

### What is covered

- Oil price, supply, outlook
- Fuel demand and outlook
- Refinery crack spreads
- Capacity utilization rates
- Turnaround outlook
- Capex forecast by region
- Capex breakdown
- Capital projects by player
- Supplier profiles / models
- Operator profiles/models
- News summary/analyses
- Regulations and tech.

### Topics of coverage

- Downstream performance and profitability assessment
- Downstream capex, investment outlook, and projects
- Issues and outlook for downstream supply chain / vendors
- Analyses of industry players, trends, projects, and news
- Strategy scenarios, signs, milestones, winners, losers, etc.

### Illustrative themes

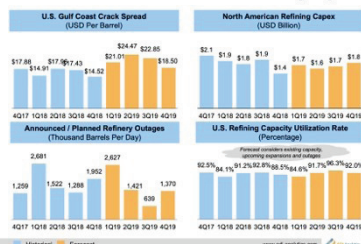
- Refining operating costs and outlook
- Petrochemical capex outlook
- Refining and midstream nexus for growth
- Ethylene cracker projects review
- Light-heavy crude differentials
- Ethanol, E15 and beyond
- Electric vehicles, CAFÉ, and fuel demand
- Global catalyst market review

### Excerpts from recent reports

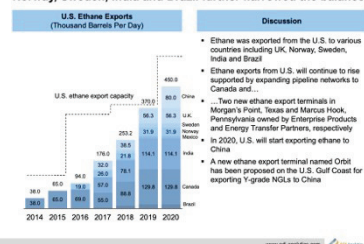
Refiners will have a strong 2019 with robust crack spreads and continued capital spending although some risks remain



In key NA refining metrics, crack spread, capital spending, and turnarounds increase while utilization rate falls marginally



Growing ethane exports demand in countries including UK, Norway, Sweden, India and Brazil further narrowed the balance



For more information, please contact [info@adi-analytics.com](mailto:info@adi-analytics.com) or +1 832 768 8806



## ADI Gas Monetization Advisory

ADI's Gas Monetization Advisory is a subscription service for research, intelligence, analytics, and insights on natural gas utilization options and markets. It helps subscribers identify and act on opportunities, trends, and risks in gas use for power, LNG, fuels, chemicals, and transportation with market intelligence, cost / economic analytics, project news, and forecasts.

### How you benefit

- **Identify and take advantage of** trends, opportunities, and risks in gas utilization options
- **Understand power, LNG, and gas exports** via trusted market intel and primary research
- **Make decisions confidently** with reliable updates on capital projects, M&A, and awards
- **Save time** with concise, easy-to-digest presentation reports with clean, compelling visuals
- **Access data** from ADI's proprietary analytics and tools for your models and analyses
- **Answer urgent questions immediately** with on-demand access to ADI's research team

### What you get

- Quarterly PDF report on **gas monetization markets**
- Quarterly PDF report with **insights on topical theme**
- Quarterly spreadsheet with **market data and analytics**
- Annual call for **interactive discussion on research**
- On-demand phone / e-mail **access to research team**
- Complimentary access to the **annual ADI Forum**

### What is covered

- Gas price, supply, outlook
- Gas utilization volumes
- Power demand / outlook
- LNG supply / demand
- LNG prices and margins
- Capex forecast by project
- Capex splits by option
- Capital projects by player
- Operator profiles/models
- News summary/analyses
- Regulations and tech.
- Emerging tech profiles

### Topics of coverage

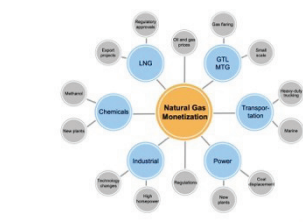
- Operating gas utilization projects' performance and outlook
- Power, LNG, and gas use projects, capex, and investments
- Issues and outlook for gas utilization supply chain / vendors
- Analyses of industry players, trends, projects, and news
- Strategy scenarios, signs, milestones, winners, losers, etc.

### Illustrative themes

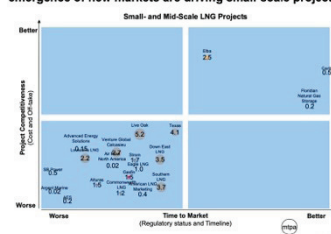
- Chinese LNG demand and infrastructure
- Gas conversion to methanol
- Methanol-to-power costs and economics
- Emerging gas monetization technologies
- Alternative marine fuels and outlook
- Gas turbine market assessment
- Gas-to-liquids cost and economics
- Gas storage market review

### Excerpts from recent reports

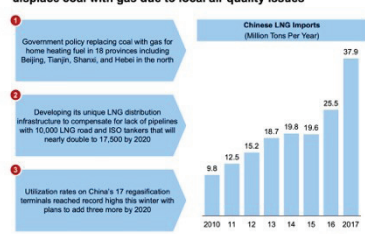
Natural gas monetization spans several active, dynamic, rapidly evolving, and increasingly interlinked markets



Finally, liquefaction technology improvements and the emergence of new markets are driving small-scale projects



China is importing more LNG and investing in infrastructure to displace coal with gas due to local air quality issues



For more information, please contact [info@adi-analytics.com](mailto:info@adi-analytics.com) or +1 832 768 8806





## ADI Multi-Client Reports

|  |   |
|--|---|
| <b>Small- and medium-scale LNG</b>     | In-depth review of the small- and medium-scale LNG market in North America covering demand, supply and projects, costs and economics, infrastructure, technology, policy and regulatory issues, and forecasts.    |
| <b>IMO 2020 scenarios</b>              | Scenario planning around IMO 2020 identifying compliance options and implications for oil and gas producers, refiners, traders, equipment suppliers, and marine fuel consumers with adoption and price forecasts. |
| <b>Hydrocarbon exports</b>             | Comprehensive review of the North American infrastructure to export oil, gas, LNG, ethane, ethylene, and polyethylene including a review of the corresponding global supply, demand, and price markets.           |
| <b>Oilfield water treatment market</b> | North American produced and flowback water volume forecasts and treatment options, costs, economics, and treatment players and their profiles to identify investment opportunities and market trends.             |

## ADI Data, Forecasts, and Analytics

ADI maintains a wide range of historical data and forecasts on regional and global supply, demand, pricing, capacities, and owners. We can gather any kind of market and asset data at a highly granular level. Contact us if your needs are not in the illustrative list below.

| Commodities  |                       | Assets, plants, and infrastructure |                                |
|--|-----------------------|------------------------------------|--------------------------------|
| ▪ Crude oil by type                                | ▪ Natural gas and LNG | ▪ Oil / oilsand reserves / fields  | ▪ LNG export / regas plants    |
| ▪ Refined products                                 | ▪ Natural gas liquids | ▪ Well counts by type              | ▪ Methanol / ammonia units     |
| ▪ Methanol   | ▪ Ammonia             | ▪ Completions by type              | ▪ Refineries, units, terminals |
| ▪ Petrochemicals                                   | ▪ Polymers by grade   | ▪ EOR, gas, and artificial lift    | ▪ Heavy oil upgraders          |
|  |                       | ▪ Production facilities            | ▪ Thermal / met coal mines     |
|  |                       | ▪ Pipelines by mile / dia          | ▪ Coal processing assets       |
|  |                       | ▪ Compression stations             | ▪ Power plants by type         |
|  |                       | ▪ Gas processing plants            | ▪ Water treatment plants       |
| Equipment, product, and service market assessments |                       |                                    |                                |
| ▪ Well automation                                  | ▪ Shape charge liner  | ▪ Asset virtualization             | ▪ Distributed control          |
| ▪ Offshore gas fac.                                | ▪ Downhole casing     | ▪ Maint. drones                    | ▪ Proc. automation             |
| ▪ Offshore pipelines                               | ▪ Energized fracs     | ▪ Condensate splitter              | ▪ Flare gas recovery           |
| ▪ Chemical inj pumps                               | ▪ Oilfield chemicals  | ▪ LACT / GPU units                 | ▪ Refining catalysts           |
| ▪ Acidizing market                                 | ▪ Wireless seismic    | ▪ Compressor serv.                 | ▪ Tower internals              |
|  |                       | ▪ Cryogenic plants                 | ▪ Micro GCs                    |
|  |                       | ▪ Drag reducers                    | ▪ Frac sand                    |
|  |                       | ▪ Corrosion inhibitors             | ▪ Wireless power               |
|  |                       | ▪ Sulfur removal tech              | ▪ Energy storage               |
|  |                       | ▪ Pipe coatings                    | ▪ Compressor drives            |
|  |                       |                                    | ▪ Brush seals                  |
|  |                       |                                    | ▪ H2S scrubbers                |
|  |                       |                                    | ▪ LNG storage tanks            |
|  |                       |                                    | ▪ Small-scale GTL              |
|  |                       |                                    | ▪ Hypercompressors             |
|  |                       |                                    | ▪ Lube/fuel additives          |
|  |                       |                                    | ▪ Hydrogen plants              |
|  |                       |                                    | ▪ MTBE market                  |
|  |                       |                                    | ▪ Shale trucking               |
|  |                       |                                    | ▪ Lube recycling               |
|  |                       |                                    | ▪ Compressor valves            |







**ADI Forum**  
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**Save the date!**  
**Thursday, February 25, 2021**  
**Houston, TX**





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**Tuesday, April 14, 2020**  
**Houston, TX**







# ADI Analytics

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