



ADI Forum

**Houston, Texas
February 24, 2022
www.adi-forum.com**



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 500 projects for more than 200 clients including ExxonMobil, Shell, Chevron, ConocoPhillips, Saudi Aramco, Schlumberger, Phillips 66, Reliance, BASF, Dow, GE, Honeywell, Siemens, KKR, Microsoft, 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, and hosts two conferences each year.

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.

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Welcome to the 2022 ADI Forum!

Global oil & gas and energy markets are finding themselves in a very different world coming out of the pandemic. This new world expects – one could argue, demands – meaningful and substantive commitments, strategies, and projects that prepare oil & gas and energy companies for the transition to a future with low and eventually no – or, more precisely, net-zero – carbon emissions. Humanity has previously experienced multiple energy transitions even if the generation or two living through the most disruptive phases of these transitions find it new.

What will the Energy Transition look like? What technologies and businesses are advantaged? Where are new innovations and business models coming from? All of ADI's scenarios show that oil & gas will play a central role through the Energy Transition, and, in the case of natural gas, likely beyond. What does that mean for a major hydrocarbon exporter that North America has become in the past decade? How are leading oil & gas players navigating the Energy Transition?

Facilitating a comprehensive, strategic understanding of such themes that permeate the energy dialogue today is why we host the ADI Forum. Six panel sessions, kicked off by a Keynote and ADI's Energy Outlook, featuring more than 25 speakers will help you get current on upstream, midstream and NGLs, LNG, and Energy Transition. More importantly, you will connect the dots across these segments for a strategic view of the oil and gas and Energy Transition value chains 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



Faiza Tanvir
Forum Producer



Agenda

7:30 am Registration and Breakfast

8:15 am Welcome

8:30 am Keynote Presentation



Christopher Smith, *Cheniere Energy, SVP Policy, Govt & Public Affairs*

9:15 am Energy Outlook in 2022



Uday Turaga, *ADI, CEO*

10:00 am Panel 1: Upstream Oil & Gas



Linhua Guan
Surge Energy, CEO



Aaron Ketter
Devon Energy, VP Mid-Cont. & S. TX Bus. Unit



Natalya Brooks
Moderator

10:50 am Break

11:10 am Panel 2: Midstream and Natural Gas Liquids



Paul Bieniawski
Enstor Gas, CEO



John Staebel
LyondellBasell, Director, NA Feedstocks



David Paradis
Trillium Flow Technologies, CEO



Joseph Gentry
GTC Vorro, VP, Licensing



Carol Conomos
INNIO, Dir, Customer Excel. (Moderator)

12:20 pm Lunch



01:20 pm Panel 3: Navigating the Energy Transition



Kirsty McCormack
BP, VP, Special Projects



Heath DePriest
Phillips 66, VP Emerging Energy



Brandon Schwertner
Priority Power Management, CEO

2:10 pm Panel 4: Natural Gas & LNG



Michael Mott
NextDecade, SVP Strategy



Matt Jackson
Crowley, VP Bus. Dev. Shipping & New Energy



Dena Wiggins
Natural Gas Supply Association, CEO

3:00 pm Break

3:20 pm Panel 5: Hydrogen and Fuels



David Hatrick
Huntsman, VP Innovation



Trevor Best
Syzygy Plasmonics, CEO



Muhammad Islam,
IHI E&C, SVP, Bus.Dev.& Technology



Ari Greenberg
AlphaSense, Head of Sales, Energy & Industrials

4:10 pm Panel 6: Innovation for Energy Transition



Eric Bradley
Taurus Investment Holdings, MD New Energies & Sustainability



Leslie Beyer
Energy Workforce & Technology Council, CEO



Alex Robart
Microsoft, Energy & Sustainability Leader

5:00 pm Adjourn and Cocktails



Speakers



Trevor Best is the founding CEO of Syzygy Plasmonics. Before starting Syzygy, he worked for Baker Hughes. There he steadily progressed into management, where he gained expertise in quality assurance (Six Sigma Black Belt), regulatory compliance, technology development management, project and personnel management, supply chain management, internal/external communications, and business process architecture. With Syzygy he has successfully raised three funding rounds and is currently focusing on bringing Syzygy's revolutionary photochemical technology to market.



Leslie Beyer is the CEO of the Energy Workforce & Technology Council. Beyer's career include 15 years serving in the U.S. Senate, multiple presidential campaigns, The White House – Executive Office of the President, U.S. State Department and U.S. Department of Housing and Urban Development. Recently, she served as Director, Member and Board Relations with the National Association of Manufacturers. She is an Independent Director on the Board of Natural Gas Services Group, Inc. She also serves on the Boards of the World Affairs Council of Greater Houston and IPAA/PESA Education Advisory Board. She is a former Independent Director at PPI and served on the U.S. International Trade Administration's U.S.-Mexico Energy Business Council. Beyer holds a BA in Latin American Studies and Spanish from the University of Texas at Austin.



Paul W. Bieniawski is CEO of Enstor Gas LLC. Prior to that, he was CEO of Zechstein Midstream BV, a European focused independent midstream services provider. Previously, Bieniawski founded and led Katy Energy Partners, an international energy infrastructure consultancy firm. He has also held leadership roles at Bobcat Gas Storage after having worked for Reliant Energy Power Generation, Enron North America, Sofregaz U.S., NorAm Hub Services, Tenneco Gas, Amoco Production Company, and Pennzoil Producing Company. He is past Chair of the Gulf Coast Section of the Society of Petroleum Engineers.



Eric Bradley leads Taurus Investment Holdings efforts in clean energy delivery and high efficiency energy consumption for new and existing real estate, overseeing its EcoSmart Solution affiliate and RENU Communities subsidiary, and leading Taurus' ESG policy and energy transition programs firmwide. Bradley has over 29 years of experience in the energy and energy technology sector. He joined Taurus from Shell New Energies. Prior to that role, he led Engie's North American division transition from merchant thermal generator into renewable energy and energy solution services. Bradley has held prior positions in strategy/business development, energy retailing and new business division launches, and has extensive experience in power and natural gas markets, renewable energy, energy storage and energy services.





Natalya Brooks is an accomplished professional with over 20 years of experience in the energy industry, innovation, and corporate development. She is the Founder and Managing Director of Everchange Advisors, LLC – a consultancy providing services in strategic planning, project management and energy transition. Prior to Everchange, Brooks was a Sr. Strategy Advisor and VP Strategy at Equinor, the national energy company of Norway.



Carol Conomos brings industry experience gained in midstream operating companies including Energy Transfer/Sunoco Logistics and CMS Field Services, as well as heavy industrial OEM equipment manufacturing, technology, packaging, rental fleet and service companies including Dresser-Rand, Siemens, SEC Energy and Miratech. She currently serves as Director, Customer Excellence at INNIO's Waukesha division. Conomos diverse global experience includes P&L accountability, commercial leadership, strategic planning, engineering, and operational roles. She holds a B.S. in Mechanical Engineering, and Master's in Engineering and Technology Management. Conomos serves on the board of the Gas Machinery Research Council and has been a member of the Mechanical Engineering Industrial Advisory Board at the University of Tulsa and sits on the education committee of the Gas Compressor Association.



Heath DePriest is the VP, Emerging Energy for Phillips 66. He has nearly 30 years of experience in the oil and gas industry. Previously, DePriest was GM, Corporate Strategy. Past roles include serving as MD, Terminals Business Development. He has also served as manager of the Midstream Growth Program for Phillips 66, DePriest started his career with Koch Industries at the Pine Bend Refinery in Minnesota before joining Conoco in 1997 as a refinery engineer at the Lake Charles Refinery. He served in various roles in Refining. He worked on the strategic integration team during the formation of ConocoPhillips in 2002 and then later in 2012 was on the corporate strategy team responsible for leading the spin-off of Phillips 66 from ConocoPhillips. DePriest holds a Bachelor of Science in chemical engineering from Oklahoma State University.



Joseph Gentry is currently Vice President of the Technology Division of GTC Vorro Technology LLC. Gentry was one of the original founders of GTC Technology, which was the first global process licensing firm to be established in many years. He has 40 years of experience in the industry as a specialist in aromatics processing, advanced distillation, clean fuels, and sulfur removal from natural gas streams. He is a registered professional engineer in the state of Texas, USA. Gentry earned a BS Chemical Engineering from Auburn University and MBA from University of Houston.



Ari Greenberg, Head of Energy and Industrials, joined AlphaSense in February of 2021. With over 15 years of experience, Ari is a key partner for strategy, M&A and competitive intelligence professionals across the sector. He is highly collaborative, dedicated, and has a proven track-record of building teams that deliver impeccable results for our clients.





Linhua Guan is the CEO of Surge Energy, the largest private E&P company in Houston Texas according to Houston Chronicle. He previously worked for CNPC, Chevron, Statoil and Star Energy International Corp. As a registered petroleum engineer in Texas, Linhua has served on various technical and management committees and published more than 30 technical papers & research reports in the past 20+ years. He received a BE degree in Petrophysics and an MS degree in Geology from China Petroleum University. He also received a MS degree in Petroleum Engineering from Texas A&M University and an MBA from Rice University.



David Hatrick is Vice President Innovation at Huntsman Advanced Materials. Hatrick leads global R&D for the division with R&D teams located in the US, Switzerland, and China. He is accountable for the development and commercialization of new materials and process technologies across multiple markets, from aerospace through to electrical power and clean energy. In parallel, Hatrick is leading the creation of a new business exploiting a novel methane pyrolysis technology, creating both hydrogen and a unique, solid form of high value carbon known as Miralon®. Hatrick has a PhD in Applied Physics from the University of Strathclyde in Scotland.



Muhammad N. Islam, Senior Vice President of Business Development & Technology with IHI E&C, has over 42 years of technology and business development experience. His current duties include management of the business development group and further development of company's technology portfolio. Islam's technical background includes know-how in renewables, bio-fuels, carbon capture, and synthesis gas & derivatives. Islam holds B.S. degree in chemical engineering from University of Teesside.



Matt Jackson is the Vice President of Business Development for Crowley Shipping and New Energies. He joined Crowley Maritime in 2002 and has worked in several areas of the company including liner shipping, logistics, and petroleum transportation. Prior to Crowley, Jackson worked with a major consulting firm as a supply chain and information technology consultant and was a U.S. Air Force captain serving as an acquisitions officer where he was responsible for project management, procurement, contract negotiations, and supplier management. He has a bachelor's degree in mechanical engineering from the University of Alabama and a master's in industrial engineering from the University of Arkansas.



Aaron Ketter is the Vice President of the Mid-Continent and South Texas Business Unit for Devon Energy. His teams are responsible for creating and executing the corporate strategy encompassing financial performance, capital program, and business development opportunities. Prior to this position, Ketter held various roles at Devon including VP Rockies Business Unit, VP Strategic Planning, Manager midstream and marketing, acquisition and divestitures, deep-water exploration, and multiple onshore engineering assignments. Ketter earned an MBA from the University of Chicago Booth School of Business and a B.S. degree in Petroleum Engineering from the University of Oklahoma.





Kirsty McCormack is part of the Strategy and Sustainability leadership team who coordinate the formulation of BP's business and sustainability strategies, and she has accountability for developing in-depth understanding of critical markets in which BP chooses to participate. She joined BP in 1997 after obtaining a PhD in Chemistry from the University of Glasgow, UK, and has spent her whole career with BP. McCormack has held variety of leadership roles in finance in the Upstream business, including most recently VP Planning and Commercial for BP. Previously she has held regional Commercial Manager roles in Egypt, Angola and the Gulf of Mexico. Outside of Upstream finance, McCormack has also held roles in Group Treasury and in the Project Management Office for the major organizational change program "Reinvent bp".



Michael R. Mott is SVP, Corporate Strategy of NextDecade. Mott has significant strategy, finance, operations, and risk management experience spanning the entire energy industry value chain. Most recently, Mott worked as CFO of LNG Limited. Prior to this position, he held various senior roles leading business execution in BG Group's Global LNG business, and as SVP – (HSSE) with responsibility for global workforce. Previously, Mott held progressively senior risk management and accounting roles for Dynegy Inc., becoming SVP – Chief Accounting Officer and Controller. He spent thirteen years with Price Waterhouse LLP before joining Dynegy.



David Paradis is CEO of Trillium Flow Technologies. A highly successful global business leader in the industrial equipment market. Former President of Weir Flow Control and Group Executive Member of Weir Group PLC. Also, former President of Weir's group of pressure-pumping businesses. Earlier in his career, Paradis held various senior leadership roles in Tyco Flow Control, now part of Emerson. Paradis has extensive experience in operational turnarounds, mergers and acquisitions, and strategy development. Paradis holds a Bachelor of Science degree in Mechanical Engineering and an MBA from Texas A&M University.



Alex Robart is the Microsoft's Worldwide Strategy Leader for Energy & Sustainability. In this role, he owns Microsoft's commercial viewpoint on energy and sustainability, drives BU strategy, and works with customers to develop transformation and sustainability strategies. Most recently, he was the CEO an AI SaaS company at the leading edge of operations technology digital transformation. Prior to that, he was a technology entrepreneur investor. He has an MBA from the University of Michigan and a BS in Systems Engineering from the University of Virginia.



Brandon Schwertner is the CEO of Priority Power Management. Schwertner was the past co-founder of MP2 Energy, an industry-leading electricity and services platform company, sold to Shell Energy North America in 2017, and former Founder and Managing Partner for Teleios Commodities. He is a serial entrepreneur in the energy industry and has been responsible for the creation of two energy services businesses and two commodity trading hedge funds. Schwertner began his career as the former head of electricity trading at Credit Suisse and Sumitomo.





Christopher Smith joined Cheniere as Senior Vice President for Policy, Government and Public Affairs. Prior to joining Cheniere, Smith was the Assistant Secretary for Fossil Energy at the U.S. Department of Energy, where he led the department's policy, international engagement, and R&D programs for fossil energy. During that time, he also served as the designated federal official for the National Commission on the BP Deepwater Horizon Oil Spill and Offshore Drilling. Prior to his roles in federal government, Smith served in managerial and analytical positions at Chevron and Texaco, focused primarily on upstream business development and LNG trading. Smith began his career as an officer in the U.S. Army and served tours in Korea and Hawaii. He subsequently worked for Citibank and JPMorgan in New York City and London. Smith holds a bachelor's degree in engineering management from the United States Military Academy at West Point and an MBA from Cambridge University.



John Staebel is currently Director of North America Feedstocks O&P at LyondellBasell Industries and is responsible for sourcing and delivery of all feedstocks and natural gas. He has more than 27 years of experience in the chemical industry. His various roles span across engineering, manufacturing, corporate development and commercial. Staebel has spent the last 10 years at LYB in commercial roles along with time executing global M&A transactions. Prior to working at LyondellBasell, Staebel worked with Chevron Phillips Chemical and Chevron Chemical in engineering, commercial and corporate planning roles. Staebel has a BA degree in Economics and a BS degree in chemical engineering from Rice University, and an MBA from Texas A&M University.



Dena E. Wiggins is President and CEO of the Natural Gas Supply Association (NGSA), representing major integrated and independent natural gas producers in the U.S. Wiggins also a member of the Commodity Futures Trading Commission's Energy and Environmental Markets Advisory Committee, Board of NAM's Council of Manufacturing Associations, Board of the British-American Business Association, Advisory Council of New Mexico State University's Center for Public Utilities, and Council Group of the American Bar Association's Infrastructure and Regulated Industries Section. Prior to NGSA, she was a partner at the firm of Ballard Spahr and served as General Counsel to the Process Gas Consumers Group. She holds a B.A. degree from the University of Richmond and a Juris Doctor from Georgetown University Law Center.



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.





Utkarsh Gupta is a senior analyst with ADI Analytics and brings experience in the oil & gas, refining, petrochemicals, reservoir management and drilling & production in the upstream sector. Prior to ADI, he was with Reliance Industries. 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



Jacqueline Unzueta is an analyst with ADI Analytics and brings experience in the specialty chemicals industry and industrial gases industry. Unzueta received her B.S. in Chemical Engineering from the University of Houston. During college, she had interned as a Chief Resilience and Recovery Intern for the City of Houston, She had interned at Air Products, and lastly, she interned as a Process Safety Intern for Kuraray. Apart from her internship experience, she also designed an ethylene glycol plant using process simulation software during her last year of college.



Thomas Dennis is a junior analyst who holds a bachelor's degree in petroleum engineering from Texas A&M University. He brings experience as a former project engineer with Galley Support Innovations as well as with the Student Engineering Council at Texas A&M where he has spent time designing new workflow models to better streamline manufacturing processes, as well as researching and designing potential solar powered battery home systems.



Manuel Diaz is a junior analyst who holds a bachelor's degree in chemical engineering from the University of Houston. He brings experience with research on alternative materials for automotive batteries and propulsion systems, while also competing with such systems against national and international universities. He also brings experience in data analysis by converting data into practical insights by predicting and modeling outcomes for greenfield projects.



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- Energy transition opportunities for offshore OFS player
- Natural gas flaring and fugitive emissions outlook for E&P operator
- Decarbonization strategy for an oil & gas super major



Midstream & NGLs

- Global oil and gas pipeline outlook for private equity firm
- ESG and fugitive emissions strategy for a midstream operator
- Ethane and NGL exports outlook for leading Appalachian operator



Natural Gas & LNG

- U.S. LNG opportunities in the Philippines for power producer
- Price-demand elasticity of industrial gas demand for trader
- Haynesville natural gas outlook for LNG exporter



Refining & Downstream

- Refinery co-processing options from renewables for catalyst vendor
- Sustainable aviation fuel outlook for an oil & gas super major
- CAFE standards analysis and outlook for refining independent



Hydrogen

- Due diligence on hydrogen diaphragm compressors for OEM
- Go-to market strategy for hydrogen start-up in shale plays
- Electrolyzer cost and market outlook for Asian private equity firm



Energy Transition

- Electric vehicles and infrastructure outlook in U.S. for investor
- Carbon capture and monetization market for chemical major
- Global energy transition and digital transformation for tech major



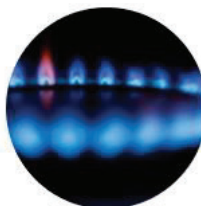
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Global CapEx Outlook

Quarterly forecast and analysis of global capital spending in E&P, midstream, refining, LNG, petchem

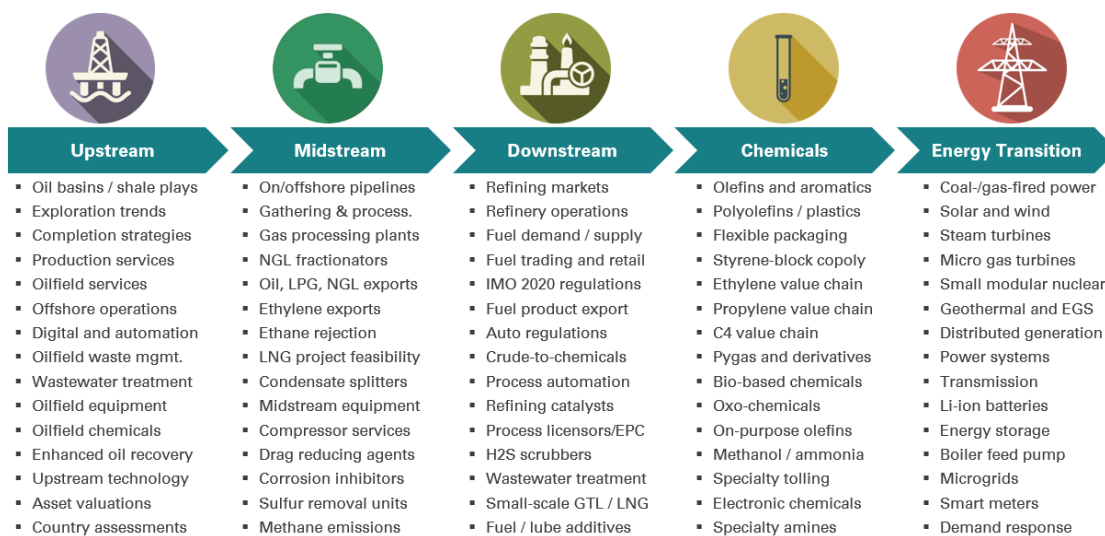


Global OpEx Outlook

Quarterly forecast and analysis of operating expenses in upstream, midstream, downstream, and LNG

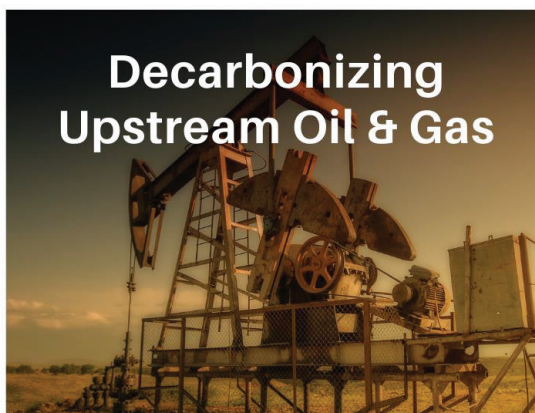
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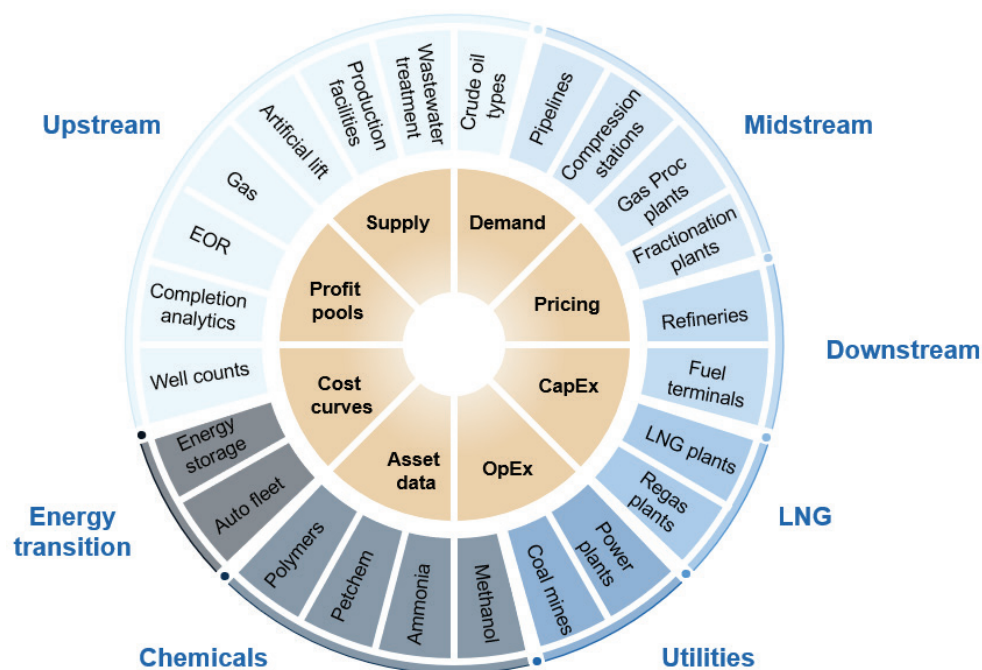
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