



Green Markets A Bloomberg Company

Sulphur Products Summit 2019

Insight on Ag and Industry

October 1-2, 2019

InterContinental Buckhead Atlanta

Networking Lunch Sponsor



Welcome



Green Markets A **Bloomberg** Company

Sulphur Products Summit 2019

Dear Attendee,

Thank you for joining Sulphur Products Summit 2019. Our goal is to provide you with valuable market perspective that's unavailable anywhere else.

The conference faculty provides you access to a variety of expertise. Each will share their respective knowledge from a particular area of importance from across the sulphur and sulphuric acid complex.

I thank them as well for making time in their busy schedules and I hope you find and opportunity to connect with them and other from the Summit. To that end, I encourage you to login to the Summit application at [GMEvents.app](#).

Please let any of your hosts from Green Markets and Acuity know how we can make your Sulphur Products Summit experience more valuable.

Sincerely,

A handwritten signature in black ink, appearing to read 'Dan Houder', with a stylized flourish at the end.

Dan Houder
Managing Director
Green Markets

Download the Sulphur Products Summit event application at [GMEvents.app](#) for full presentations, speaker bios, surveying and networking capabilities.

Agenda

Tuesday October 1, 2019

- 8:00 am **Networking Breakfast**
- 9:05 am **An Industrial Economic Outlook:
A Precursor for Sulphur Supply and Demand**
John Baffes, Senior Economist, World Bank Group
- 9:40 am **Nat Gas and Crude: An Outlook for Cyclical and Structural Drivers**
Vince Piazza, Global Energy Research Coordinator, Bloomberg Intelligence
- 10:25 am **Morning Networking Break**
- 11:00 am **IMO 2020: Insight and Implications for the Global Sulphur Industry**
Ralph Grimmer, Senior Associate, Stillwater Associates
- 11:35 am **Global Sulphur Market Review and Outlook: Supply, Demand and Prices**
Fiona Boyd, Director, Acuity Commodities
- 12:20 pm **Networking Luncheon**
Sponsored by **Saconix**
- 1:45 pm **Market Trends in Water Treatment Impacting Sulphuric Acid Demand**
Nicolas Bernier, Procurement Manager, Chemtrade
- 2:20 pm **The Shifting Paradigm of the Sulphur Fertilizer Industry**
BJ Harrington, Marketing Manager, Tiger-Sul Products, LLC
- 3:05 pm **The Impact on Sulphuric Acid Demand From a Rebound in Pulp and Paper Production**
Chaoyi Chang, Renewable Bioproducts Institute, Georgia Tech
- 3:40 pm **Afternoon Networking Break**
- 4:10 pm **What's Powering the Alkylation Market?**
Armond Johnson, Business Director, Eco Services – PQ Corporation
- 4:45 pm **The Current State of Sulphuric Acid Transportation: A Supplier's View**
Tom Hobbs, Trader, Glencore
- 5:30 pm **Networking Cocktail Reception**

Agenda

Wednesday October 2, 2019

- 8:00 am **Networking Breakfast**
- 9:05 am **Phosphate Production Outlook**
 Alexis Maxwell, Research Director, Green Markets
- 9:50 am **Global Sulphuric Acid Market Review and Outlook:
Supply, Demand and Prices**
 Fiona Boyd, Director, Acuity Commodities
- 10:35 am **Morning Networking Break**
- 11:05 am **Metals and Mining:
An Expert View, Latest Projections**
 Andrew Cosgrove, Global Head, Metals & Mining,
 Bloomberg Intelligence
- 11:50 am **Ammonium Sulfate and Ammonium Thiosulfate
Market Outlooks**
 Alexis Maxwell, Research Director, Green Markets
- 12:30 pm **Summit Conclusion**



Faculty



John Baffes Senior Economist World Bank Group

John Baffes, currently a member of the World Bank's Prospects Group, heads the Commodities Unit and is in charge of the Commodity Markets Outlook, a World Bank publication focusing on commodity market analysis and price forecasts.

John's experience with the World Bank spans several regions and units including Latin America, South Asia, East Africa, Evaluation, and Research. John specializes in the areas of commodity market analysis and resource economics.

John, whose work appears often in media outlets and academic journals, is also teaching an executive MBA course on Applied Econometrics for Commodity Markets.

Prior to entering graduate school, John managed a commodity trading company. He holds degrees in Economics (BS, University of Athens, Greece), Agricultural Economics (MS, University of Georgia), and Agricultural and Resource Economics (Ph.D., University of Maryland).



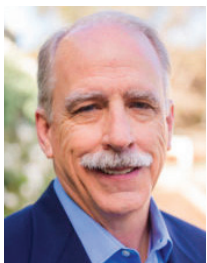
Vince Piazza Senior Energy Analyst-Global Energy Research Coordinator Bloomberg Intelligence

Vincent Piazza is Senior Energy Analyst-Global Energy Research Coordinator, at Bloomberg Intelligence. Bloomberg Intelligence is a unique research platform that provides context on industries, companies, and government policy, available on the Bloomberg Professional Service.

Prior to joining Bloomberg, Mr. Piazza was Senior Research Analyst at Lord Abbett with responsibility for large, mid-cap, SMID Cap E&P and Energy Services stocks. He previously held analyst positions at Fiduciary Trust Company, Deutsche Asset Management, S&P, UBS Investment Bank, and JP Morgan Chase.

Mr. Piazza received a Bachelor's Degree in Economics from Fordham University and a Master's Degree in Finance from New York University. Mr. Piazza also maintains a Chartered Financial Analyst accreditation.

Faculty



Ralph Grimmer Senior Associate Stillwater Associates

Ralph Grimmer is a senior executive with 38 years of experience in the U.S. downstream and midstream oil sectors. He has a wealth of operational and commercial experience with Texaco, Motiva Enterprises, and Tesoro plus consulting experience with Baker & O'Brien. Ralph has a strong background in crude oil and refined products logistics (pipelines, terminals, rail, trucking), downstream optimization, supply & trading, business development (both line operations and M&A), refining, and rack marketing of petroleum products.

Ralph's experience base includes refining, supply & trading, and regional optimization over 24 years with Texaco. For seven years starting with the formation of Motiva Enterprises, he was the executive responsible for 46 proprietary refined products terminals, 600 thousand barrels per day (bpd) truck supply of gasoline to Shell and Texaco retail outlets, and rack marketing of 250 mbd of home heating oil and other unbranded refined products. He championed development of an industry-first rack pricing optimization tool. Over the six years Ralph was with Tesoro, his executive leadership transformed Tesoro's logistics function from a low visibility cost center into a robust, rapidly growing master limited partnership. Expansion of Tesoro Logistics' Bakken-focused assets (pipelines & gathering) and throughput volumes in North Dakota and significant increases in proprietary product terminals throughput volumes were among the highlights of this transformation.

Ralph received his B.S. in Chemical Engineering from Texas Tech University.



Tom Hobbs Trader Glencore

Tom has over 28 years' experience in various commercial and risk management roles within the mining, commodity trading and chemical industries at Noranda, Rio Tinto, Xstrata and Glencore in North America and Europe.

Tom has been with Glencore since 2013 as Commodity Trader and has an Honours Bachelor of Economics degree from the University of Western Ontario and a Master of Business Administration degree from York University.



Fiona Boyd
Director
Green Markets

Fiona Boyd is Director of Acuity Commodities. She has covered the global sulphur and sulphuric acid markets since 2008 with a specialized focus on the North American market.

Her expertise was developed under the mentorship of her father, Dr Robert Boyd. She has conducted numerous consultancy projects and regularly presents to clients and at industry events.

In addition, Fiona played a key role in the development of several industry publications including weekly reports on the domestic and global markets as well as market outlook reports.

Prior to joining the sulphur/sulphuric acid industry, Fiona was a consultant and market analyst in the real estate sector. Her primary focus was conducting feasibility studies for hotel development and residential land acquisition deals.

Fiona earned a bachelor of science from the University of Houston, where she graduated with honors.



Nicolas Bernier
Corporate Procurement Manager
Chemtrade

Nicolas Bernier has recently been promoted as corporate procurement manager at Chemtrade. He leads the North American procurement department (+60 plants operating across N.A.) and is responsible for strategic sourcing of direct materials (such as Salt, Aluminum Hydrate, Sulfuric Acid (Water Plants), Caustic Soda, etc.) as well as procurement of certain indirect materials and services.

Before joining the Chemtrade's procurement team, Nicolas has spent over 10 years in chemical sales. He was part of Chemtrade's sales team for over 5 years managing Eastern Canada sales account. Previous to this role, he worked 6 years as an account manager for Buckman Canada which was primarily focus in specialty chemicals for the Pulp and Paper industry.

Nicolas has a bachelor degree in chemical engineering from University Laval in Quebec City, Canada. He is based in Quebec City, Canada.

Faculty



BJ Harrington Marketing Manager Tiger-Sul Products, LLC

BJ has worked in marketing management for industrial distributors, advertising agencies, and ag-chem manufacturers over his thirty year career.

He uses his national and global marketing experience from Control Solutions and the Stoller Group along with the knowledge and support of Tiger-Sul to build communication and branding strategies and actions that promote Tiger-Sul Products in the US, Canada, and around the globe.

Tiger-Sul, Inc. is a global leader in sulphur bentonite, micronutrient-enhanced sulphur and other crop performance products. Since 1964 Tiger-Sul, Inc. has been a world leader in Sulphur fertilizer industry, earning a reputation for providing premium-quality products and extraordinary customer service. Our collective skills, industry knowledge and integrity benefit our customers, suppliers, business partners, employees and the community.

As an international manufacturer, importer and exporter, Tiger-Sul, Inc. is able to mobilize resources throughout the world. The company's strategically-located processing plants, offices and warehouses create an efficient pipeline for the vital commodities and crop performance products it manufactures and markets.



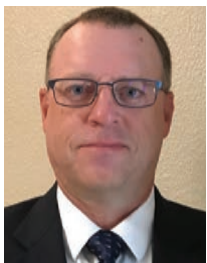
Chaoyi Chang Renewable Bioproducts Institute, Georgia Tech

Chaoyi Chang is currently a PhD student in Paper Science and Engineering and the School of Chemical and Biomolecular Engineering at Georgia Tech.

Her research is about building data-driven models for predicting energies and reaction mechanisms of transition metal catalyzed biomass system by machine learning method. She also had experience on molecular dynamics (MD) and density functional theory (DFT).

Prior to graduate school, she earned a bachelor degree in chemical engineering (Tianjin University, China) and a bachelor degree in chemistry (Nankai University, China).





Armond Johnson
Business Director
Eco Services – PQ Corporation

Armond has been with Eco Services Corp., a division of PQ Corp. since 2006 and is currently Director, Business & Commercial – Refining Services.

Prior to joining Eco Services, Armond held business, commercial and operations roles in the waste management industry with firms including Teris LLC (Suez), Safety-Kleen (Clean Harbors) and Laidlaw Environmental.

Armond received a B.A. in Chemistry from Lawrence University and an M.S. in Environmental Management & Policy from the Lally School of Business at Rensselaer Polytechnic Institute.



Alexis Maxwell
Research Director
Green Markets

Alexis Maxwell is Research Director with Green Markets and is originally from Illinois.

Prior to joining Green Markets, Alexis held positions in market research and sales at fertilizer producers SABIC and CF Industries. She also launched a satellite imagery startup focused on agriculture production at Lanworth (now Thomson Reuters).

Alexis received a MS/MBA in Agribusiness Management from Purdue University's School of Agricultural Economics and Indiana University's Kelly School of Business and a BA from The College of William and Mary.



Andrew Cosgrove
Global Head, Metals & Mining
Bloomberg Intelligence

Andrew is responsible for conceptualizing, constructing and maintaining research dashboards for the metals & mining sectors with a focus on drilling and oilfield services, as well as North American exploration and production.

Previously, Andrew covered a wide range of commodities including base and precious metals, steel, iron ore and coal.



Sponsor



Saconix' overriding business strategy is built on the commitment of investing in long-term resource and asset management partnerships, outstanding customer service and infrastructure investment. Saconix is a market leader in providing logistics and comprehensive support to the agriculture, energy, chemical, and mining & metals industries; boasting 60,000 tons of storage in a multi-product, multi-modal terminal located in Beaumont, TX as well as 20,000 tons of sulfuric acid storage in Elko, NV. A wholly owned subsidiary of Copperbeck Energy Partners LLC, Saconix is backed by \$150 million equity commitment from Tailwater Capital. With strategically located assets, exclusive marketing agreements, production capabilities, and global supply sources, Saconix is the "Flywheel" of the sulfuric acid market in North America.

Green Markets® A Bloomberg Company

Green Markets has been the most trusted, widely read resource for fertilizer business news, analysis and market activities for 40 years.

Along with a weekly market report, Green Markets provides confidential Advisory Services, proprietary market research and custom data feeds.

Learn more about Green Markets at **FertilizerPricing.com**

Green Markets' parent company, Bloomberg, is a global information and technology company, connecting decision makers to a dynamic network of data, people and ideas – accurately delivering business and financial information, news and insights to customers around the world.



Acuity Commodities was created in 2016 to provide clarity on the sulphur and sulphuric acid markets.

Acuity offers independent price assessments and analysis to help industry stakeholders make business decisions. *Briefing: Sulphur*, *Briefing: Sulphuric Acid* and *Regional Briefing: US and Canada* are the three pricing reports that Acuity offers at present, with additional products and services available.

Visit our website for more on Acuity Commodities:

www.AcuityCommodities.com

Green Markets A Bloomberg Company

Specialty Fertilizer Global Summit 2019

December 12, 2019

Le Meridien, New Orleans

Coming this December, the Green Markets **Specialty Fertilizer Global Summit**.

Return with us to New Orleans where you'll join leadership from across the fertilizer value chain for the latest thinking on specialty and value-added fertilizers.

For questions about this conference please contact Customer Service at 800.531.0140 (1.603.357.8103) or email GMsupport@bloomberg.net.



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