
ARPEL Leadership Program

3rd. edition

Empowering the vision
of the Regional Leaders
from the Oil & Gas Industry

Module 2

The Role of Refining in the Scenario of the Energy Transition and Energy Security

Agenda

September 13 - 15, 2023
Houston, USA



ASSOCIATION OF OIL, GAS AND
RENEWABLE ENERGY COMPANIES
OF LATIN AMERICA AND THE CARIBBEAN

S&P Global
Commodity Insights

Day 1

Wednesday, September 13

Downstream Strategic Outlook

The first day will provide a global and regional downstream strategic outlook highlighting global context of developments, challenges, and competition. What are the key strategic questions in the refinery industry and how are markets influenced -in Latin America and the Caribbean- by these larger trends?

8:00 - 9:00 am	Women in Leadership in the Energy sector Guest speaker: Karen Jones – Executive Industry Advisory Lead – S&P Global Commodity Insights Moderator: Marisa Denosowicz
9:00 - 10:00 am	Session 1 Downstream fundamentals Before diving into the world of refining, the basic understanding of refining processes and operations will be briefly discussed.
10:00 - 10:30 am	Breakout 1: Interactive team exercise
10:30 - 11:00 am	Break
11:00 am - 12:00 pm	Session 2 Global refining overview In this session global perspectives and overview of refining sector covering refinery capacity, supply and demand forecasts, trades.
12:00 - 12:30 pm	Breakout 2: Interactive team exercise
12:30 - 2:00 pm	Luncheon Dialogue Latin American Leaders Abroad Guest speaker: Manuel Flores – President – PMI North America Guest speaker: Oscar Moran – Director, KPE Engineering Moderator: Debnil Chowdhury
2:00 - 3:00 pm	Session 3 Regulatory trends What policies and regulations are affecting the refining industry? Is the global regulatory landscape converging or diverging?
3:00 - 3:30 pm	Breakout 3: Interactive team exercise
3:30 - 4:00 pm	Break
4:00 - 5:00 pm	Session 4 Refining and competitive landscape in Latin America and the Caribbean Latin America and the Caribbean has presented swings and volatile dynamics in the refining industry. Where does the region stand in the global market? Is the industry fighting for survival or can it be competitive and integrated with the rest of the world?
5:00 - 5:30 pm	Breakout 4: Interactive team exercise
7:00 pm	Dinner Departure by transfer from Hotel DoubleTree Hilton to Grotto Ristorante

Day 2

Thursday, September 14

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Energy transition scenarios, the map to energy security and the role of refining

The crisis in Europe has brought back the discussion around energy security in the midst of energy transition. Latin America and the Caribbean depends heavily on refined products imports, particularly from the United States. How will Latin America and the Caribbean position its downstream industry in this new landscape?

8:00 - 9:00 am	The role of petrochemicals in the energy transition Guest speaker: Rina Quijada, VP Chemicals and Petrochemicals - S&P Commodity Insights Moderator: Felipe Perez
9:00 - 10:00 am	Session 1 Global energy scenarios review We will explore S&P Global's scenarios and worldviews of energy supply and consumption.
10:00 - 10:30 am	Breakout 1: Interactive team exercise
10:30 - 11:00 am	Break
11:00 am - 12:00 pm	Session 2 Climate change and energy transition (What is ahead for Downstream) Climate change has become a business strategy issue from the daily operations to the value of a company's stocks and interest of investors. Is there a place for refining as the push to energy transition gains momentum? Is a future without refining possible?
12:00 - 12:30 pm	Breakout 2: Interactive team exercise
12:30 - 2:00 pm	Luncheon Dialogue What's ahead for the downstream sector Guest speaker: Kurt Barrow, VP Oil, Midstream, Downstream – S&P Commodity Insights Moderator: Felipe Perez
2:00 - 3:00 pm	Session 3 Downstream disruptors and technology developments What drivers and new technologies are taking place in the downstream sector? Is there still a place for traditional fuels?
3:00 - 3:30 pm	Breakout 3: Interactive team exercise
3:30 - 4:00 pm	Break
4:00 - 5:00 pm	Session 4 Roundtable discussion of Latin America and the Caribbean refining past and future strategies Gathering and linking the information and discussion from the previous sessions, this session will deep dive in the past, for lessons learned, and what the future for Latin America and the Caribbean's refining will look like
5:00 - 5:30 pm	Breakout 4: Interactive team exercise
7:00 pm	Dinner Departure by transfer from Hotel DoubleTree Hilton to Pappadeaux restaurant

Day 3

Friday, September 15

Technical visit to Deer Park Refinery

8.00 am	Departure in transfer from Hotel DoubleTree Hilton to Deer Park Refinery
9:00 - 9:15 am	Arrival to the site
9:15 - 9:30 am	Registration and access
9:30 - 9:45 am	Introductory meeting, presentation of attendees
9:45 - 10:45 am	History and overview of the refinery
10:45 - 11:00 am	Preparation for the tour
11:00 am - 12:00 pm	Driving tour (dock, storage, and process facilities)
12.00 - 1:00 pm	Departure in transfer from Deer Park Refinery to DoubleTree Hilton Hotel



Felipe Perez

Americas Director and Strategist Midstream & Downstream Energy

Felipe Perez is LATAM Downstream Strategist and Director of Oil Markets, Midstream & Downstream for the Americas with IHS Markit based in Los Angeles, California. He has 15 years of experience in consulting in the oil and gas industries, mainly in downstream sector. He joined IHS Markit in 2017.

His primary focus is on assisting clients with performance improvement and strategic initiatives. His expertise is on PADD 5 and North America and Latin America fuels markets connectivity.

Prior to joining IHS Markit- SP Global, Felipe worked as a Senior Consultant and Business Development Executive at KBC covering major Latin America clients.

Felipe holds a B.S.E. in Chemical Engineering from the University of São Paulo, Brazil and an M.Sc. in Refinery Design and Operation from University of Manchester, England. Fluent in Spanish, Portuguese, and English



Debnil Chowdhury

Vice President, Americas Head of Refining and Marketing

Debnil leads the team of analysts responsible for short and long-term downstream refined product supply, demand, and margin outlooks for North and Latin America and the Caribbean. Since joining S&P Global in 2012, he initially led the North American natural gas liquids team where he created the company's proprietary long-term ethane analytics price, supply, and demand forecast model. The model can be utilized to quantitatively link and provide insight on ethane supply/demand to long-term pricing and is utilized by clients to make large capital decisions for petrochemical assets globally.

In his current role in refining, Debnil and his team focus on refined product market forecasting and price forecasting. He led the Light and Heavy Naphtha service creating the proprietary refining, NGL, petrochemical supply, demand, and price forecasting models for the service. Recently, Debnil was instrumental in the development of views of supply, demand, and refinery rationalization during the COVID-19 crisis and continues on-going work to aid clients to navigate market fluctuations due to the virus.

In addition to his research responsibilities, Debnil has been involved in several consulting projects for refined product market, pricing, and new market entry strategy studies for clients in the U.S Gulf Coast, Eastern U.S., Atlantic Basin, Caribbean, Latin America, Europe, CIS, Africa, Middle East, and Asian markets. Additionally, he has worked closely with private equity and upstream clients to perform project feasibility studies for various oil and gas assets. Debnil has evaluated potential merger, acquisition, and divestiture opportunities. His work included screening of potential assets, specific facility evaluations, and due diligence activities.

Prior to joining S&P Global, he was a Senior Market Analyst for Valero where he provided strategic planning and market analysis support for downstream, renewable, and retail assets globally. Debnil also worked as a Process Engineer for KBR, Bechtel, and the US government where he worked with clients domestically and globally to develop new refining, chemical, and nuclear technologies. Debnil holds a BS in Chemical Engineering and Certificate in International Affairs from the Georgia Institute of Technology, a MS in Predictive Analytics and Data Science from Northwestern University, and an MBA from Rice University.

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