



FUTURE DOWNSTREAM

EXPLORING DISRUPTION, SUSTAINABILITY & DIGITAL INNOVATION FOR
CONNECTED REFINERIES AND PLANTS



KONSGBERG



CAVENDISH GROUP

27-28 April 2022

CONFERENCE & EXPO

**POST-EVENT
REPORT**

2022 EVENT HIGHLIGHTS

The fourth edition of Future Downstream gathered more than 700 delegates and speakers from over 500 organisations in 76 countries on 27-28 April 2022.

The virtual conference and exhibition, organised by the Cavendish Group, brought together petrochemical and refinery operators, downstream service companies, automation and digitalisation specialists and technology solution providers to explore how disruption, digitalisation and innovation are shaping the downstream oil and gas chemical manufacturing sectors.



"All clean technologies will play a part in our reducing carbon intensity, but we can't just wait for the perfect solution. We must make smart decisions on our assets today

Bob Maughon, EVP Sustainability, Technology, and Innovation, CTO & CSO at SABIC



"I believe we will see a shift to heavy petrochemical production, with strong and careful molecule management and smarter ways of achieving conversion to minimise the number of processing steps in the product cycle

Bryan Glover, President and CEO of Honeywell UOP



"I expect to see more change in the oil and gas and chemical markets in the next 10 years than we have seen over the past 80

Alessandro Pistillo, Director of Digital Strategic Projects at BASF SE



"We have reached a threshold in digitalisation in the downstream industry where we are demonstrating tech value across the board. But it's not just about the technology, it's about the change management that goes hand in hand with it

Shane McArdle, SVP Digital Energy, Kongsberg Digital

FUTURE DOWNSTREAM 2022

VIRTUAL CONFERENCE & EXPO

THANK YOU



I feel very honoured on behalf of Cavendish Group to have welcomed the oil and energy communities to the 4th Future Downstream event. We were honoured to have had such a strong line up of refineries, chemical manufacturers and technology innovators contributing to the programme.

I would like to thank our key partners and sponsors who have continued to offer us tremendous support and value.

Digitalisation is emerging as a key driver for innovation, transformation and growth, and the downstream sector has the opportunity to redefine operations through digital transformation.

Whilst technology can become a source of positive change, we must also recognise there are several challenges that need to be overcome to fulfil the potential of the industry. It is essential that refineries become data-driven and connected to eliminate industrial accidents and unplanned downtime. Increasing remote operations and having teams closer to the asset will be one way for refineries and plants to enhance operational efficiency. How can we align strategy, capability and culture?

Digital connectivity will enable the refineries of the future to improve optimisation and analyse waste. Autonomous plants capable of predicting results in real time will revolutionise asset connectivity and predict unexpected failures.

Digitalisation should in theory make the operations more resilient in a volatile world but change management remains the biggest hurdle to overcome. Organisational culture must be driven from the top down and the impact of digitising workflow methods will become evident once fear is overcome. Often in industry, digitalisation is complex, data is siloed and workflows are misaligned. Will AI and Machine learning unlock the real

potential to these next generation hybrid models?

At Future Downstream we explored asset performance management and implementing effective APM strategies, which remain one of the greater challenges for the industry. The increased role of Predictive Maintenance and Digital Twin will be crucial to unlocking the true potential of an asset. The role of performance forecasting has never been more significant.

Innovation and Decarbonisation are also priority areas for the downstream industry. Refining is constantly changing and with margins as fine as ever how do we decarbonise and digitise whilst remaining profitable? Scaling new technologies and innovations will be vital to achieving these energy transition goals with the development of hydrogen, CCS, wind, solar, electrification and bio-fuels. How can refineries and manufacturers hasten the adoption of sustainable technologies and digitalisation whilst managing operating costs? Mastering circular economy strategies and accelerating at each stage of the value chain is paramount. We talked about championing collaboration to deliver on energy transition whilst achieving decarbonisation goals and eliminating CO2 production will ultimately be very challenging in the short term but carries significant long term benefits.

Sincerely,

Adam Soroka
Managing Director
Cavendish Group



CLICK TO VIEW ON DEMAND CONTENT FROM THE CONFERENCE

Future Downstream 2022: No one-size-fits-all solution for refiners to reach low-carbon future

More than 700 delegates and speakers from over 500 organisations in 76 countries worldwide registered to take part in Future Downstream live on 27–28 April 2022 or on catch-up.

The virtual conference and exhibition, organised by the Cavendish Group, brought together petrochemical and refinery operators, downstream service companies, automation and digitalisation specialists and technology solution providers to explore how disruption, digitalisation and innovation are shaping the downstream oil and gas sector.

In its fourth year and revised format, the Future Downstream conference analysed the key challenges and opportunities for the refining and petrochemical industries.

A series of fireside chats, panel sessions and presentations focused on machine learning, AI, asset life cycle management and performance, supply chain management, data analytics, cybersecurity, and digital transformation. The programme was packed with real-life business cases demonstrating best practices within the industry, applications, and technology solutions.

Following two days of high-level debate, discussion and

dialogue, the main message throughout the event was clear. With strict environmental regulations and changing consumer demand, futureproofing the downstream industry means new and innovative business models, smarter collaborations, and digital transformation as the world races towards net zero. But the industry needs to act now and act decisively.

Adam Soroka, Managing Director of Cavendish Group, said: "A new downstream is evolving. We're heading towards an exciting next 10 years as the industry transforms itself to help the world get to net zero by 2050 or sooner. But what does this mean for refiners and their business models and ways of working in a post-pandemic world? How do they strike a balance between safeguarding today's business and investing in the future?"

"Future Downstream 2022 mapped the pathways towards sustainability and survival, but due to the complex nature of downstream operations, it's clear there's no one-size-fits-all solution for refiners to respond to the paradigm shift. Scaling

both new technology and transformational innovations will give sites a competitive edge."

While it was evident from discussions throughout the two days that the road ahead for the traditionally conservative industry will not be easy, and standalone refiners will be hit the hardest, the optimism throughout the Future Downstream conference was notable – after all, the sector has shown before it can adapt and build resilience into its businesses.

Delegates heard that the industry has the skills and capabilities to lead the way in decarbonisation. Whether it's tackling scope 1 or 2 emissions by increasing efficiencies with new or improved processes including biofuels, implementing CCS, hydrogen, electrification, or renewable energy or tackling scope 3 emissions by providing new low-carbon products including E-fuels and green hydrogen to the market, while leveraging waste streams to build a circular economy.

While geographic region, regulation and capital will



determine how individual downstream companies navigate the energy transition, organisations were advised to start implementing energy efficiency solutions that make sense now and over the next decade, collaborate more, embrace risk and prioritise pilot projects.

Bob Maughon, EVP Sustainability, Technology, and Innovation, CTO & CSO at SABIC, said: "All clean technologies will play a part in our reducing carbon intensity, but we can't just wait for the perfect solution. We must make smart decisions on our assets today. And we must make sure that we're investing now in these more transformative technologies and capabilities that will enable the second phase of the transition."

Sharing his thoughts on the refinery for the future, Bryan

"Mastering the challenges ahead will require much tighter collaboration across geographies and value chains than today."

Alessandro Pistillo, Director of Digital Strategic Projects at BASF SE

Glover, President and CEO of Honeywell UOP, said: "I believe we will see a shift to heavy petrochemical production, with strong and careful molecule management and smarter ways of achieving conversion to minimise the number of processing steps in the product cycle. Cleaner fuels will be prioritised throughout the process before bringing on renewables fuel production."

The future refinery will also be shaped by digital transformation, and digitally connected to a degree never before possible. But open digital twin technologies have a key role to play in improving process optimisation and operational reliability, minimising energy consumption and emissions, eliminating waste products and capturing tribal knowledge in refineries, today.

Feeding good data into AI and machine learning models for predictive maintenance will bring huge benefits to the downstream industry, but the real value will only come by understanding truly how humans and machines interact.

Shane McArdle, SVP Production at Kongsberg Digital, said: "We have reached a threshold in digitalisation in the downstream industry where we are demonstrating tech value across the board. But it's not just about the technology, it's about the change management that goes hand in hand with it."

"Industry 5.0 is where we empower people again and a digital twin is where we put people central to that technology. It's not about connecting machines but delivering a user experience. User empathy is so important."

On driving adoption in digital transformation, Jason Gislason, Chief Digital Officer at Chevron Phillips Chemical Company, said: "If you can start capturing all the emissions data and waste data of all your plant operations, someday, soon, that data is going to drive the optimisation of your plant. But implementing that data capture technology

"If you can start capturing all the emissions data and waste data of all your plant operations, someday, soon, that data is going to drive the optimisation of your plant. But implementing that data capture technology needs to start with the end-user in mind."

Jason Gislason, Chief Digital Officer at Chevron Phillips Chemical Company

needs to start with the end-user in mind. If you bring users along during the design process, you will typically be more successful in achieving higher adoption rates."

Closing the event with Adam Soroka, Alessandro Pistillo, Director of Digital Strategic Projects at BASF SE, said: "These are certainly exciting times to be involved in the downstream industry. I expect to see more change in the oil and gas and chemical markets in the next 10 years than seen over the past 80."

"There was so much to learn from so many excellent speakers at Future Downstream 2022. Events like this facilitate and cultivate knowledge sharing and nurturing of business partnerships which is crucial for an industry reinventing itself. Mastering the challenges ahead will require much tighter collaboration across geographies and value chains than today."

A GLOBAL MEETING PLACE FOR THE DOWNSTREAM AND CHEMICAL MANUFACTURING INDUSTRIES

FUTURE DOWNSTREAM 2022 IN NUMBERS

745 participants from **76** countries

58 speakers in **9** panel discussions,

7 presentations and **3** interviews

91% likely to attend the event again

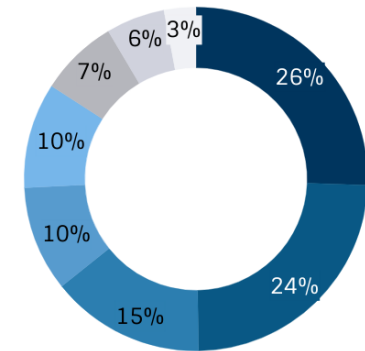
83% would recommend the event to others

82% rated the **Usefulness** of the event as **Excellent or Good**

GEOGRAPHICAL BREAKDOWN:

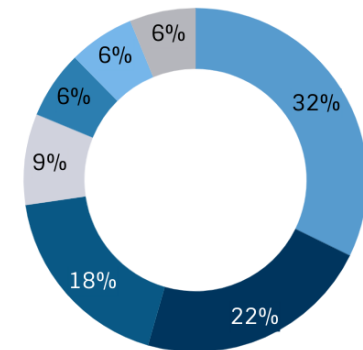


COMPANY ACTIVITY



- Consultancy
- Technology
- Refining and Processing/Petrochemicals
- National or Major Integrated Oil Company
- Independent oil & gas company
- Oilfield Service Company
- Equipment Manufacturer
- Government/Research Body

JOB FUNCTION



- Engineering
- Sales & Marketing
- Executive Management
- R&D
- Field & Plant Operations
- IT
- General Management

KEY TAKEAWAYS

THE REFINERY OF THE FUTURE - SUSTAINABLE, CONNECTED AND INTEGRATED

An integrated refinery-petrochemical complex will shape the refinery of the future, designed for the flexibility to cost-effectively address changes in market conditions in the short term and the coming decades. Critically, the future refinery will be digitally connected to manage molecules efficiently for the greatest profitability. Cloud-based connected plant technologies that can analyze plant performance data with digital twins will improve process optimization and operational reliability, minimize energy consumption and emissions, eliminate waste products and conserve water.

NO ONE-SIZE-FITS-ALL SOLUTION

The pathways taken to decarbonization will be unique to each refinery and defined by regional resources and capabilities, regulation, and a robust business case. Some of the low-hanging fruits that the industry can grasp include increasing energy efficiency, utilizing carbon capture and changing feedstock. Other pathways include fuel switching, electrification, hydrogen, new low-carbon products, and a circular economy approach. A clear roadmap to 2030, 2040 and 2050, running parallel paths and prioritizing pilot projects will be essential for future-proofing organizations.

FOCUS ON SMARTER COLLABORATIONS

Successful decarbonization and digital transformation will come from smarter collaborations with other organizations within and outside the downstream industry – reaching across government, industries, sectors, and value chains. Future Downstream was proud to welcome world-leading tech companies whose applications are not confined to the downstream industry alone.

TAKE INVESTMENT RISKS

The industry needs to learn how to experiment and embrace an element of risk. It must make investments in technologies and capabilities that will be applied from 2030 to 2050 without fully understanding how that will happen. Smart decisions on assets must be made today as the industry can't afford to wait for the perfect solution.

KEY TAKEAWAYS

HYBRID DIGITAL TWINS

By applying a hybrid digital twin, using the data from a digital twin as an input to a virtual twin, refiners can increase production rates, improve energy efficiency, measure, track and reduce emissions, and optimize systems design, predictive maintenance, and asset management. However, for the twin to be useful, data must be of high quality, verified, and referenced. Moving from reactive and preventative maintenance to a predictive approach will bring huge benefits, but the real value will only come by understanding truly human-machine interactions.

CYBERSECURITY

Employees are the first line of defence. Train, train and re-train your workforce to be aware of cybersecurity requirements for your organization. Use exercises to review practices and response/report protocols to help identify gaps. For a healthy cybersecurity culture, IT, OT and Cybersecurity must collaborate and share understandings and skills, and risk assessments should include all three. The time to implement an incident response plan is today!

DIGITAL TRANSFORMATION

The downstream industry needs to improve its level of digital readiness. But strategy, capability, culture and technology all need to align to work towards a successful digital transformation. Organizations should start their digital journey with the end-user in mind. Communicate widely and communicate deeply. By creating a culture of innovation, using a continuous improvement model and identifying change champions, complemented by top-down endorsement and bottom-up championing, adoption rates will be higher. Companies must be comfortable with failure.

FUTURE DOWNSTREAM TESTIMONIALS

Really enjoyed my participation in this year's Future Downstream Event. An excellent program, with industry leading participants and with a clear focus on key transformative trends within our industry as we drive digitalization, efficiency, and sustainability within our assets.

Bob Maughon, EVP Sustainability, Technology, and Innovation, CTO & CSO, SABIC



Future Downstream addresses the most critical issues impacting the advancement of our industry bringing together top experts to share best practices. Adoption of these practices is critical to our future.

Jason Gislason, Chief Digital Officer, Chevron Phillips Chemical Company



Excellent congress and excellent quality in presentations and panels. It really shows how the industry is moving forward and committed to a process of non-negotiable industrial transformation

Miguel Garcia Carreno, Senior Manager, Circular Economy & Industrial Decarbonisation, Repsol

Many thanks for giving me opportunity to attend Future Downstream event and being member of one of the panels. Having worked in both IT & OT it was my pleasure to share my experience on convergence of the 2 disciplines while maintaining cyber security risk and relevant controls.

Excellent speakers and never disappointing quality of all the sessions and whole event.

Marcin Szczepanik, CISO, Essar Oil UK Ltd

I thoroughly enjoyed participating in the Future of Downstream event. The program had a great mix of sector defining topics and trends and I found the Energy Transition and decarbonization focus especially valuable from my particular business angle. I look forward to next year's event.

Marc Heerink, VP Business Development & Strategy, Production, Fuels & Energy Transition, Fluor

The Future Downstream event was brilliant. The program touched on all the key themes facing the sector and also provided great Subject Matter Expertise on Asset Management, Asset Readiness, Energy Transition and Digital which are all critical for Downstream operators and contractors to maximise value for our assets

Dan Rigby, Business Development Director, Wood

Decarbonization is, probably, the biggest challenge of the modern industry. Decarbonization is a very complex problem to solve and all the technologies, all the points of views and all the intelligent solutions will have an important role in the arrival to the NET ZERO challenge. Because of that, industry opinions interchange is so powerful and because of that, event like Future Downstream are completely necessary.

A fluent and intelligent ideas interchange between industry representatives will enrich everybody. The event was extremely profitable for all of us. The panel was a great panel in diversity and experience. I enjoyed a lot the event and, the most important, I learnt a lot. I absolute recommend the attending to future events.



Miguel A. Calderon, Carbon Cycle Director Division, ESG, Cepsa

This is a decade of energy transition, of ever-increasing efficiency. The evolution of technology and our ability to not merely implement but adopt it at the enterprise level will determine the winners and losers in the years ahead. Future Downstream provided a forum of real-world perspective of how to do just that from the global experts at the forefront of these efforts. The insights and initiatives shared during the event are foundational in building the success of tomorrow



Bryan Kaus, Business Improvement & Optimisation, Commercial,

2022 SPEAKERS INCLUDED



- » Jason Gislason, Chief Digital Officer, Chevron Phillips Chemical Company
- » Bob Maughon, EVP Sustainability, Technology, and Innovation, CTO & CSO, SABIC
- » Bryan Glover, President and CEO, Honeywell UOP
- » Ibrahim Al-Syed, Director, Digital Manufacturing, Celanese
- » Yi Shin Ng, Head, Data Planning & Performance, Data Strategy, PETRONAS
- » Amit Jain, Advisor, Simulation, Chevron
- » Srinivasan Vanchinathan, Director, Refining Digital Operations, Phillips 66
- » Udayan Vyas, Emerging Technology Strategist, Chevron
- » Fabrizio D'Antonio, Asset Integrity Manager, Raffineria di Milazzo SCpA
- » Alessandro Pistillo, Director, Digital Strategic Projects, BASF SE
- » Nick Kendall, Investment Associate, bp
- » Bryan Kaus, Business Improvement & Optimisation, Commercial, Phillips 66
- » Henk Hendrix, Senior Manager Operational Sustainability, SABIC
- » Raahil Burhaani, CIO, Essar Oil UK Ltd
- » Miguel A. Calderon, Carbon Cycle Director Division, ESG, Cepsa
- » Renzo Quevedez Malini, IT Consultant, Petrobras
- » Harald Wesenberg, IT Specialist and Software Innovation, Equinor
- » Miguel Garcia Carreno, Senior Manager, Technology Process Design, Repsol



- » Geoff Mackey, Group Corporate Affairs & Sustainability Director, BASF
- » Vinicius Branchini, Global SafetyTech AI Director, DSS+
- » Jan Shumate, Director, Worldwide Engineering & Construction Solutions, Corporate Manufacturing Automation Transformation, Eastman Chemicals
- » Simon Flowers, Chief Analyst & Chairman, Wood Mackenzie
- » Sharul A Rashid, Group Technical Authority, Instrumentation and Control, PETRONAS
- » Juan Pedro Brett Mandarano, Digital Transformation Global Advisor, Repsol
- » Muhammad Zeeshan Anwar, Corporate Energy and Sustainability Expert, Technology & Innovation, SABIC
- » Marcin Szczepanik, CISO, Essar Oil UK Ltd
- » Michael Lewis, Cyber Security and Technology Strategy Planner, Chevron
- » Tim Shire, Energy and Carbon Manager, Essar Oil UK Ltd
- » Elgin Suggs, Director, Digital Culture and Transformation, McDermott International
- » Renata Lopes, Predictive Industrial Lead, Braskem
- » Thomas Heinzerling, SVP, Advanced Operations Services, Linde GmbH
- » Alan Gelder, VP Refining, Chemicals and Oil Markets, Downstream Global, Wood Mackenzie
- » Deepika Sandeep, AI Lead, Honeywell
- » Karthick Srinivasan, World Wide Leader, Operations Technology Transformation Solutions, AWS
- » Therese Bording Hermann, Global Public Affairs Director, Topsoe

- » Panagiotis Tsiakis, Director, IT Business Applications, Hellenic Petroleum
- » Isabelle Conso, Director, Digital Innovation, Axens
- » Dan Rigby, Business Development Director, Wood
- » Ifedayo Orimoloye, Senior Director, Business Strategy, McDermott International
- » Nicola Knight, Director, EMEA Decarbonisation and Energy Transition, Advisian
- » Dr. Chris Manson-Whitton, Director, Progressive Energy
- » David Hartell, Managing Director, Stellae Energy Ltd
- » Shannon Katcher, Executive Director, Digitalisation and Data, Gas Technology Institute
- » Shane McArdle, SVP Production, Kongsberg Digital
- » Jaime Aguilera, Founder & CEO, Voovio Technologies
- » Francesco Coletti, CEO, Hexxcell Ltd
- » Michael Jansen, Chairman and CEO, Cityzenith
- » Haavard Oestensen, VP of Growth, Digital Twins, Kongsberg Digital
- » Horia Orenstein, VP, Business Development, Lummus Digital
- » Oleg Schkoda, Senior Director, TCG Digital
- » Marc Heerink, VP Business Development & Strategy, Production, Fuels & Energy Transition, Fluor
- » Raj Mutha, Chief Solution Officer, Flutura
- » Christian Retek, Chief Revenue Officer, Flutura
- » Katherine Hutton, Senior Strategy Consultant, StealthPath Inc

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KONGSBERG



Accelerate your digitalization journey

At Kongsberg Digital, we accelerate digitalization and fast-track ROI with our digital twin solution, **Kognitwin® Energy**, which enables optimized operational performance, energy consumption and safety with the Hybrid Machine Learning technology.

Combining cutting edge technology with open and scalable solutions, with Kongsberg Digital as your partner, you can deploy the dynamic digital twin in your asset in a matter of a few weeks and rapidly start realizing all the benefits from digitalization.

SOME OF OUR ATTENDING COMPANIES

• 2DA Analytics	• Cognite	• Idemitsu Kosan	• Raffineria di Milazzo SCPA
• ABB	• Conex Petroleum Refining Company	• Implico	• Red Sea National Petrochemicals
• Abu Dhabi Oil Company	• CORYS Inc	• Indonesia Institute of Technology	• Reliance Industries Ltd
• Accenture	• Cyberhawk	• Infosys Consulting	• Repsol
• ACT (Arabian Chemical Terminals)	• Dangote Petroleum Refinery and Petrochemicals	• Institute of Chemical Technology Mumbai Marathwada Campus Jalna	• R-STAHL
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• Aspentech	• Energy Robotics	• Marsh	• ServiceMax
• Assai Software Services	• Equilex Chemicals	• McDermott International	• Shell
• Asystem	• Equinor	• Microsoft	• Siemens Energy
• Atos	• Ergon, Inc.	• Mitsubishi Chemical Europe	• Singapore Petroleum Company Limited
• AVEVA	• Essar Oil UK Ltd	• Mina Petroleum LLC	• SOCAR Ammonia and Urea Complex
• axens	• ExxonMobil	• Motor Oil Hellas Corinth Refineries S.A.	• SPE
• Baja Energy Gas	• Fluor Corporation	• Muse, Stancil & Co.	• StealthPath
• Baker Hughes	• Flutura Decision Sciences & Analytics	• Nuclear AMRC	• Stellae Energy Ltd.
• BASF plc	• Fulcrum Bioenergy	• Ocean57 Shipping	• StepChange Global
• Bechtel Ltd	• Gizil Enerji	• Olympic	• TCG Digital LLC
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• bp	• Haldia Petrochemicals Ltd	• Orex Consulting	• Tetracore Energy Limited
• Braskem	• Haldor Topsoe A/S	• Pak-Arab Refinery Company Ltd	• The Dow Chemical Company
• Bureau Veritas	• Hellenic Petroleum Digital	• Pakistan Petroleum Limited	• Topsoe A/S
• Carl Bechem Lubricants India Pvt Ltd	• Hempel	• PDVSA	• Total East Africa Midstream
• Capgemini	• Hexagon PPM	• Pertamina	• TUPRAS
• Celanese	• Hexxcell Ltd	• Petrobras	• Vidya Technology
• CEPSA	• HODLNG, a blockchain for LNG	• Petrocon Engineers	• Voovio
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• Cityzenith		• PwC	• Yokogawa
• Clariant			• ZynQ 360 Ltd

ENQUIRIES

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