

HART

Global Crude, Refining & Clean Transportation Fuels Outlook to 2030

Now Includes
Pricing Forecast

*With Separate Regional Forecasts
for 2015, 2020, 2025 and 2030*



**Now FULLY ACCESSIBLE ONLINE,
with a searchable and interactive
supply & demand database by region,
country, fuel type, and year:**

- >> **Crude & Refined Products Pricing:**
 - Short term 2011-2013
 - Long term 2010-2030
- >> **Global, Regional and Country Specific Analysis**
- >> **Crude, Refined Products and Clean Transportation Fuels Trade Flows**
- >> **Crude and Product Quality Requirements**
- >> **New Refineries and Expansion Projects**
- >> **Global Public Policy Implications**
- >> **Continuous Refinery Investment Tracker and On-site Meetings**



**A service from
Hart Energy Consulting**

www.hartwrfs.com

World Petroleum Product Markets are Undergoing Unprecedented Change

Obtain the information and analysis you need to meet the industry's emerging challenges with Hart's World Refining & Fuels Service (WRFS) – providing new, concise in-depth analysis and special focused reports on key developing countries, resources and fuel markets.



KEY BENEFITS

- >> **Rely upon Hart's accurate data and dependable forecast scenarios for your strategic planning** – our data is considered a reference for multinational and national oil companies, automotive industry and government.
- >> **Understand distillates global supply and demand situation** with our analysis and forecasts, splitting the sector into product segments (on-road, off-road...) and different sulfur levels (10 ppm, 50 ppm ...)
- >> **Identify and supply & demand imbalances** through our global fuel distribution projections and product quality outlook
- >> **Evaluate market developments and potentials in other regions** through our regional supply & demand analysis, integrating each region for the six different time frames
- >> **Maximize your business development efforts and investment decisions** by keeping track of refinery projects and expansions around the globe, through our online refineries database and refinery capacity investment projections
- >> **Improve your understanding of the impact of renewable fuels** on the refining industry and how biofuels affect petroleum products availability and prices

EXCELLENT TOOL FOR DETAILED BUSINESS PLANNING

- Based on full LP programming (based on Aspen Tech's PIMS)
- Projections are provided in 5-year increments from 2010 through 2030.
- Distillate demand and supply forecasts are split into product segments (on-road, off-road, agriculture, industry etc...)
- Supply & Demand split into different sulfur levels (15 ppm, 15-50 ppm, 50-500 ppm and more than 500 ppm).
- Detailed capacity outlook by type of process (reforming, FCC, Coking...)



Who Should Read the Report?

- Refinery Executives and Strategic Planners
- Crude Producers
- Technology/Catalyst Licensors
- Lubricant/Additive Suppliers
- Engineering Firms
- Pipeline/Tanker Fleet Transport Services
- Investors and Financial Planners
- Automotive Manufacturers
- Government Compliance Agencies
- Ethanol and Biodiesel Producers

IN-DEPTH LOOK AT THE FUTURE OF REFINING

Global Crude, Refining & Clean Transportation Fuels Outlook covers:

>> EXECUTIVE SUMMARY

- Short Term Price and Economics Outlook
- Global Industry Business Climate
- Crude Oil Supply, Quality Analysis
- Petroleum Product Demand Projections
- Worldwide Fuel Quality and Specifications Outlook
- Inter-Regional Product Trade Trends
- Refinery Capacity and Expansion Forecasts
- Renewable Fuels Outlook
- Key Fuel Quality Drivers

>> GLOBAL OVERVIEW, OUTLOOK & PROJECTIONS

- Short Term Supply and Pricing Analysis
- Crude Oil Supply and Quality Outlook
- Product Supply/Demand Balances and Distribution
- Refining Capacity/Configuration Drivers and Trends
- Refining and Market Opportunities
- New Dynamics in Product Supply/Demand

>> DETAILED ANALYSIS ON:

- Gasoline
- Naphtha
- Jet Fuel and Kerosene
- On-road Diesel and Other Distillates
- Marine and Residual Fuel
- Refinery Complexities
- Fuel Quality Developments
- GTL/CTL
- Renewable Fuels Supplies
- Incremental H₂ Production

>> BI-MONTHLY TOPIC-RELATED ANALYSIS

- China
- India
- Heavy Crude Oil
- Russia
- Global Octane Reports
- Refinery Tracker

A COMPREHENSIVE SERVICE PROVIDING EACH YEAR:

- A library of reports analyzing the latest developments on the hottest topics
- Full electronic website access to the analysis
- Regular updates throughout the year
- On-site meetings with specialists
- Unlimited access to global experts for study-related questions
- Access to specific on-line webinars



>>> **Every analysis is globally balanced – individual regions** are not analyzed alone, but integrated for the six different time frames identifying key refining and supply opportunities.



1. North America – Canada, USA (by PADD)
2. Latin America, with focus on Brazil, Mexico & Venezuela
3. Western Europe & South Eastern Europe
4. Commonwealth of Independent States (CIS) with focus on Russia
5. Asia-Pacific, with focus on China, India and Japan
6. Africa
7. Middle East, with focus on Saudi Arabia

Global Hart Experts Contribute to the Report

Combining the skills and knowledge from all Hart Energy consultants around the world, including fuel quality and policy specialists from Hart's International Fuel Quality Center and biofuels experts from Hart's Global Biofuels Center.

TERRY HIGGINS

Project Leader & Main Contributor
Executive Director,
Refining & Special Projects

- >> Experience in the fuels & refining industry: 35 years
- >> 14 years as technical director with the National Petrochemical & Refiners Association (NPRA)
- >> Also worked with TEXACO, HESS, and US DOE



FREDERICK L. POTTER

Executive Vice President,
Hart Energy Publishing

- >> Experience in the fuels and refining industry: 30+ years
- >> Oversees all management and direction of Hart's Global Consulting Business. Has been called upon by governments and companies worldwide to advise on refining and biofuels issues



DR. MICHAEL A. WARREN

Executive Director,
Strategic Research

- >> 11 years as Latin America Research Manager at Toyota
- >> Participating member of the Demand Task Group of the National Petroleum Council's Oil & Natural Gas Study.
- >> Served on the Board of Directors for Green Plains Renewable Energy (GPRE)



DR. PETR STEINER

Director, Global Refining

- >> Doctor in chemical engineering from the Norwegian University of Science and Technology
- >> Worked with Statoil, the SINTEF research center, and with the University of Cambridge, U.K. on the improvement of refining catalysts



HART ENERGY CONSULTING

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With extensive experience in the industry and offices in more than 10 worldwide locations, Hart Energy Consulting provides expertise to:

- >> The world's leading national oil companies: Petrobras, Petronas, Reliance, Saudi Aramco and Sinopec;
- >> Top Fortune 500 multi-national energy companies: BP, Chevron, ConocoPhillips, ExxonMobil, Hess, Petroplus, Shell and Total;
- >> Investors and financial institutions: Citigroup and Nasdaq;
- >> Engineering companies and technology: Axens, Criterion, Lubrizol, UOP and CDTECH;
- >> Automotive companies: GM, Honda, Peugeot SA, Toyota, Volkswagen and Volvo;
- >> Key international organizations: OPEC, CEN, EIA, ASTM, JCAP, ISO, METI, APEC, UNPCFV;
- >> Governmental bodies: U.S. EPA, Chinese EPA, Vietnamese government, EU Commission, EU Parliament, U.S. DOE, White House CEO, Australian DEWR, South African DME, GCC Standards Organization;
- >> And many more...

More Reports from Hart's World Refining & Fuels Service:

- >> Global Heavy Crude Oil Outlook to 2030
- >> Global Unconventional Gas Outlook
- >> Electrification of Transportation in the U.S.
- >> Quarterly Short Term Crude Oil Price Forecast
- >> Global Distillate Outlook
- >> Quarterly Short Term Refined Product Price Forecast

To subscribe to this report or receive other consulting services, contact the expert near you today!

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USED AS REFERENCE DATA IN OPEC'S
ANNUAL OUTLOOK SINCE 2004