

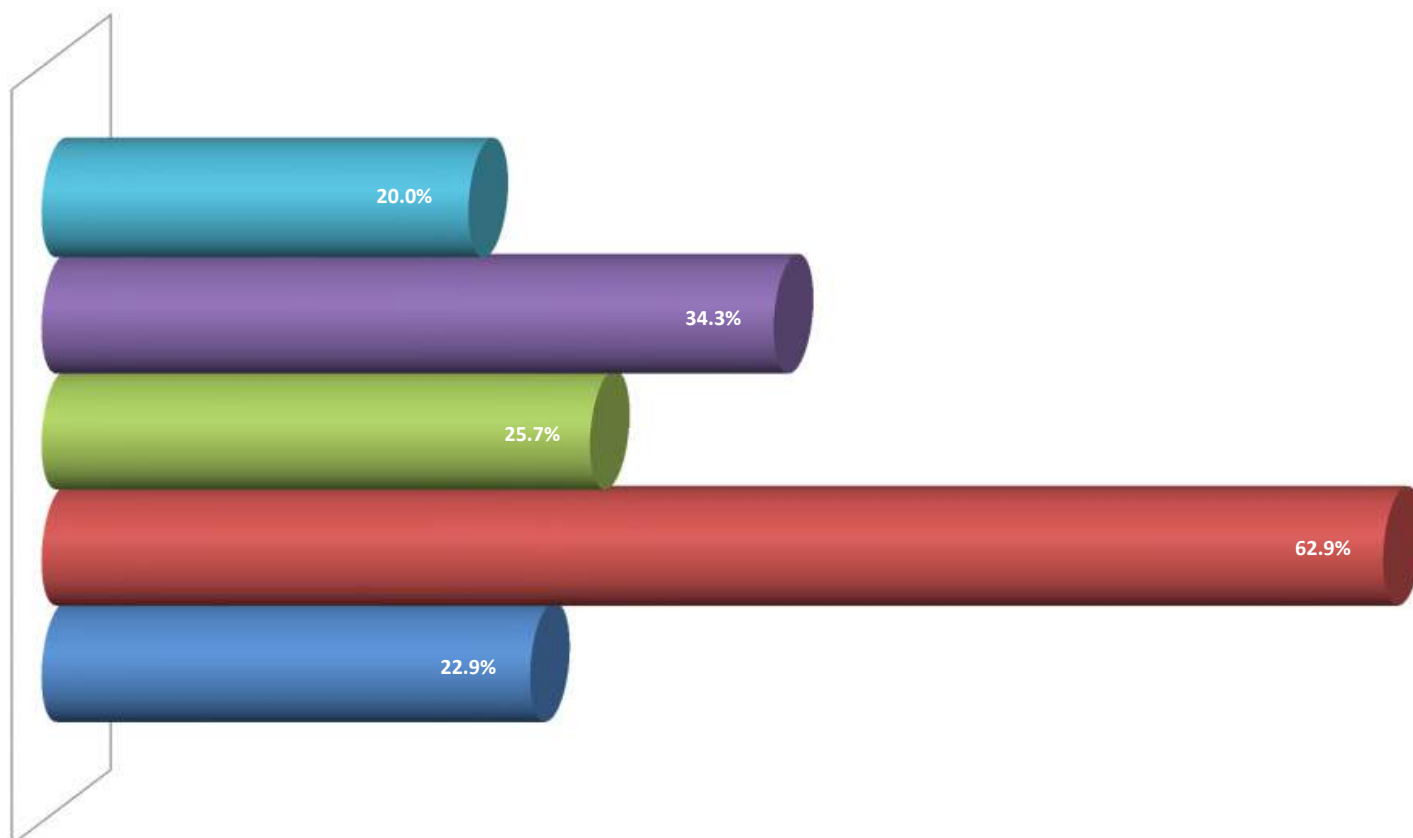


Coking.com Industry Survey

We asked the coking.com community to weigh in with perspectives. This is what you said.

If you are building or operating a DCU, how do you determine what is required for efficient coke handling, load out, transport, and logistics systems for petcoke management.

■ Other ■ vendors ■ experts from other industries like mining ■ experts from other refineries ■ seminars



Has a petcoke management disruption affected DCU operations directly? If so, how?

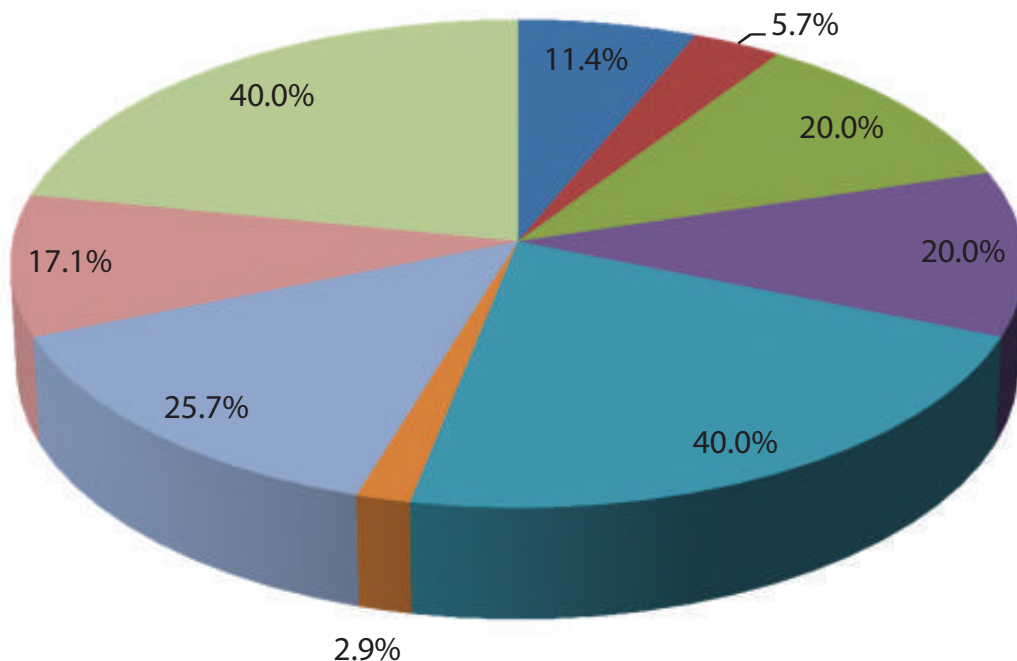


Most important considerations for refiners considering investment in coker conversion capacity to monetize heavier, higher refractory crudes?



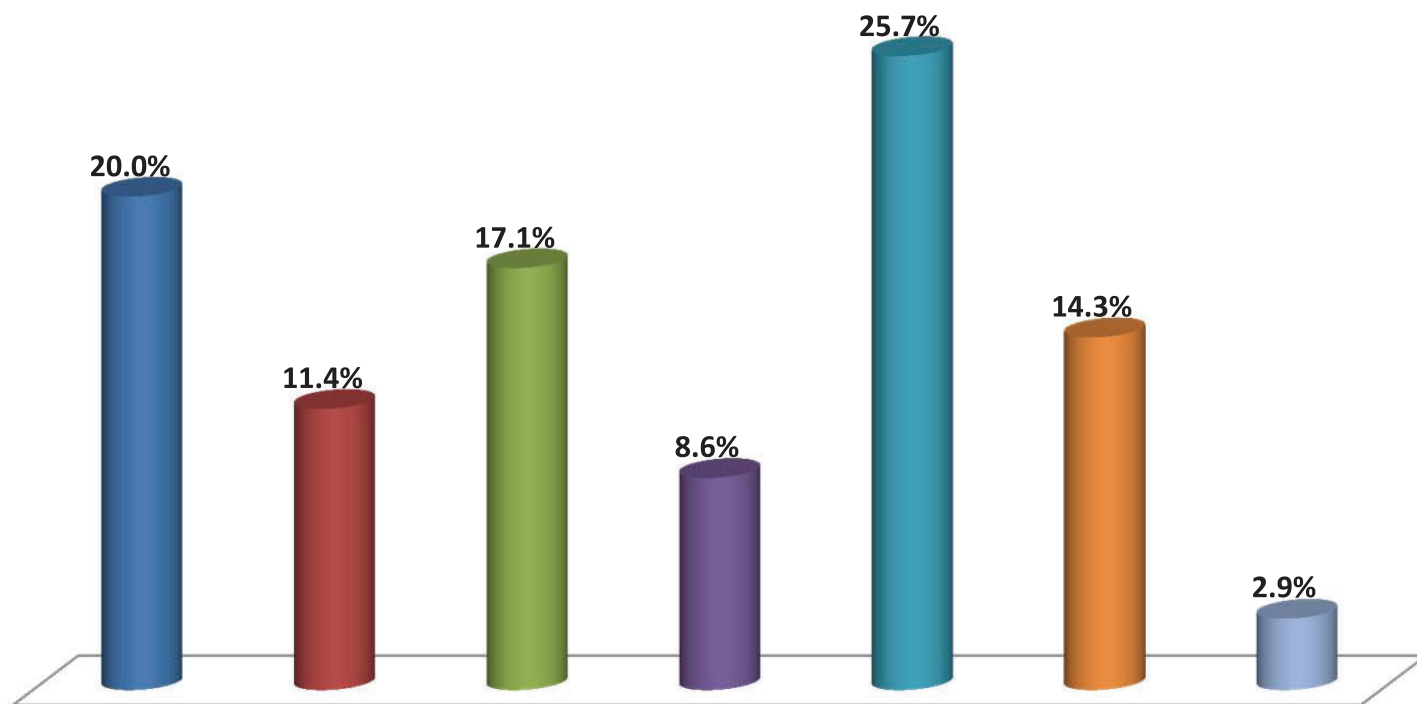
Top segments and activities influencing petcoke production:

- Surge in needle coke demand
- Access to chemical markets based on petcoke feeds
- Shift from bunker fuels to marine gas oil and marine diesel
- Alumina industry requiring higher volumes of calcined coke



- Direct marketing of petcoke fuel to cement kiln manufacturers
- Diversion of light and heavy coker naphtha for LPG and aromatics markets
- Cogeneration opportunities (steam & electricity) from the coke calcining process
- Syngas production from coker operations combined with other resid upgrading process
- Production of incremental volumes of diesel and gasoline available from petcoke upgrading.

What will drive expansion of coker capacity outside of North America?



- Resid and bitumen upgrading imperatives
- Closer integration of coker capacity with catalytic conversion units
- Dual processing of light feedstocks with surges in heavy crudes (when available)
- East Asian refiners incorporating cokers to serve dual role as fuel supplier and cogeneration source
- Long term plans by upstream Middle East producers to supply refiners with low API gravity crudes
- Mega refinery projects typically seen in Asia and Middle East developed around coker as the primary thermal conversion process
- Transportation of marketable coker byproducts providing another profit outlet for pipeline constrained refiners in developing regions.

Join coking.com at our 1 day pre-conference seminar at the
8th Argus Americas Petroleum Coke Summit
Sept. 14, Houston, Texas



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