

International Sugar Organization



18th INTERNATIONAL SEMINAR

Crunch time for sugar and ethanol?

Tuesday 24 & Wednesday 25 November 2009



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18th Seminar – 2009

The world economy is crisis ridden. The shattering of the banking system, the breakdown of allegedly inviolable institutions and companies, galloping unemployment figures, a liquidity drought and worsening recession are the nasty ingredients we have to cope with.

This year's ISO seminar programme reflects the intricate challenges our rapidly transforming industries are facing.

What does that all mean for sugar and ethanol?

How does this scenario influence sugar production and consumption? How will this impact export availability and import demand? Have non sugar related factors lost their weight putting market fundamentals back in the driving seat? Is going global a strategy for success for the processing industry and will they be able to source new investments? Last but not least to which extent is the global economic environment impacting the production and the consumption outlook for fuel ethanol?

We will look at the potentially menacing impacts and consequences of the global crisis on the world sugar and ethanol markets by analyzing the financial, economic and policy drivers and considering future options, as well as the opportunities.

The Chairman of the seminar will be **Dr. Plinio Nastari, President of DATAGRO, Brazil**, one of the worldwide leading recognised consultancies in sugar, ethanol and co-generation. His excellent international reputation with governments and the private sector is well known.

Simultaneous interpretation will be provided in English, French, Portuguese, Russian, Spanish and German.

Registration

The registration fee of £730.00 also covers: lunch and an evening reception on 24 November, refreshments on 24 and 25 November, copies of the ISO Sugar Yearbook; Statistical Bulletin; Monthly Market Report; Quarterly Market Outlook; and on line access to the Seminar Proceedings immediately following the end of the event. Space is strictly limited so early registration is recommended. Details of methods of payment can be found on the enclosed registration form. Please submit the registration form with payment not later than 13th November 2009.

Should you be unable to attend in person you can access the Seminar Proceedings online (with a username and password) for a **cost of £350**. Please indicate on the registration form if you wish to purchase this service.

18th ISO SEMINAR - DRAFT PROGRAMME

Tuesday 24 November 2009

Morning Session

08.15 Registration

09.30 **Welcome** **Dr Peter Baron**, Executive Director, **ISO**

Opening Remarks by Chairman **Dr. Plinio Nastari**, President, **DATAGRO**, Brazil

09.45 ***Sugar and ethanol - first lessons from the crunch*** **Jonathan Kingsman**, Managing Director, **Kingsman SA**, Switzerland

10.20 ***Sugar fundamentals - back in the driving seat?*** **Sergey Gudoshnikov**, Senior Economist, **International Sugar Organization**, London

11.00 Coffee break

11.30 ***Volatility – the legal consequences of economic hardship*** **Mark Morrison & Brian Perrott**, Partners Holman Fenwick Willan LLP, London

12.10 ***How to finance the sugar industry in the new economic environment*** **Andy Duff**, Manager Food & Agribusiness Research, **Rabobank**, Brazil

13.00 Lunch: Britannia Hotel, Canary Wharf

Afternoon session

15.00 ***EU sugar options and perspectives*** **Lars Hoelgaard**, Deputy Director General, DG Agriculture and Rural Developments, **EU Commission**, Brussels

15.40 ***Going global - strategy for success*** **Philippe Duval**, President, **Tereos**, France

16.20 Coffee break

16.40 ***Biotechnology – opportunities and challenges for cane and beet sugar*** **Dr. Charley Richard**, Manager, **C. Richard & Associates/SPRI/SIBC**, USA

17.20 ***The impact of the liquidity crisis on foreign investments in Brazil?*** **Gui Nastari**, Economist, **DATAGRO**, Brazil

18.00 Close of first day

19.30 Reception, Institute of Directors, 116 Pall Mall, Piccadilly, London SW1

Wednesday 25 November 2009

Morning Session

- 09.00 ***Forging a multinational strategy for ethanol*** **Pedro Carrillo Donaire**, Executive Vice President, **Abengoa Bioenergy Trading Europe**, Spain
- 09.40 ***Cellulosic ethanol soon - an illusion?*** **José Luiz Olivério**, Senior Operational Vice President, **Dedini S/A** Indústrias de Base, Brazil
- 10.20 Coffee break*
- 10.40 ***Sugar import demand in Asia - crunch time?*** **Martin Todd**, Managing Director, **LMC International Ltd**, Oxford
- 11.20 ***New dynamics in the sugar freight market*** **Alex Gray**, CEO, **Clarkson Securities Ltd**, London

12.00 Lunch break

Afternoon Session

- 14.00 ***Prospects for sugar - an industrial user's view*** **Robert Guichard**, President, **CIUS** Committee of Industrial Users of Sugar, Brussels
- 14.40 ***Does the present economic environment influence deregulation?*** **Nilanjan Sanyal**, Joint Secretary, **Government of India**, Ministry of Consumer Affairs, Food & Public Distribution, New Delhi
- 15.20 ***Investing in troubled times - sugar's role - an investor's portfolio*** **James Proudlock**, Commodity Product Head, Futures & Options, **J.P. Morgan**, London

16.00 Close of seminar

For reasons not under the organizers' control, this agenda may be altered until the date of the event.