

# 2022 Global Agriculture & Materials Conference Agenda

## Wednesday, March 2

7:00 a.m. **Registration & Networking Breakfast, Ocean Ballroom Foyer**

### Ocean Ballroom II/III

### Ocean Ballroom I

7:15 - **Introduction – BofA Global Research Team**

7:30 a.m. Steve Byrne (US), George Staphos (US), Matt DeYoe (US), Michael Feniger (US), John Babcock (US), Alex Jones (EMEA), Isabella Simonato (Brazil), and Frank McGann (Argentina)

7:30 – **China Self-Sufficiency and Implications on Global Chemicals:**  
8:00 a.m. **He-Ro Chemicals Ltd**

James Rounick, *Managing Partner*

**Fireside chat with Graphic Packaging International LLC**

Stephen Scherger, *Executive Vice President & CFO*

8:10 - **Fireside chat with Corteva, Inc.**

8:40 a.m. Chuck Magro, *Chief Executive Officer*

Sam Eathington, *Chief Technology Officer*

**Fireside chat with International Paper Company**

Mark Sutton, *Chairman & CEO*

8:50 – **Panel Discussion: Fertilizer Outlook**

9:20 a.m. **He-Ro Chemicals Ltd**, James Rounick, *Managing Partner*  
**Itafos Inc**, David Delaney, *Chief Executive Officer*  
**The Mosaic Company**, Andy Jung, *Head of Market Research*  
**Moderated by:** Steve Byrne

**Fireside chat with Berry Global Group Inc.**

Tom Salmon, *Chairman & Chief Executive Officer*

Mark Miles, *Chief Financial Officer*

9:30 – **Fireside chat with Nutrien Ltd.**

10:00 a.m. Ken Seitz, *Interim Chief Executive Officer*

**Fireside chat with Louisiana-Pacific Corporation**

Alan Haughie, *Chief Financial Officer*

Aaron Howald, *Director, Investor Relations*

10:10 – **Fireside chat with Westlake Chemical Corporation**

10:40 a.m. Jeff Holy, *Vice President & Treasurer & Head of Investor Relations*

**Fireside chat with Ball Corporation**

Dan Fisher, *President*

Scott Morrison, *Chief Financial Officer*

10:50 – **Fireside chat with CF Industries Holdings Inc**

11:25 a.m. Tony Will, *President & CEO*

Chris Bohn, *Senior Vice President & CFO*

**Panel Discussion: Housing**

**Louisiana-Pacific Corporation**, Alan Haughie, *Chief Financial Officer*

**The Sherwin-Williams Company**, Jim Jaye, *Senior Vice President -*

*Investor Relations & Corporate Communications*

**Moderated by:** Steve Byrne, Matthew Deyoe, Rafe Jadrosich, John

Babcock & George Staphos

11:30 – **Panel Discussion: Biologics Panel**

12:00 p.m. **Novozymes A/S**, Tina Sejersgaard Fano, *Executive Vice President, Agriculture & Industrial Biosolutions*  
**Pivot Bio**, Karsten Temme, *Co-Founder & CEO*

**Moderated by:** Steve Byrne

**Fireside chat with Pactiv Evergreen Inc.**

Michael Ragen, *Chief Financial Officer*

Dhaval Patel, *Sr. Vice President, Investor Relations & Strategy*

12:10 – **Luncheon Panel Discussion – Sustainable Plastic, Ocean Ballroom II/III**

1:40 p.m. **Berry Global Group**, Tom Salmon, *Chairman & Chief Executive Officer*

**Eastman Chemical Co**, Brad Lich, *Executive Vice President & Chief Commercial Officer*

**LyondellBasell Industries NV**, Jim Guilfoyle, *Executive Vice President, Advanced Polymer Solutions & Global Supply Chain*

**Sonoco Products Co**, Howard Coker, *President & CEO*

Moderated by: Steve Byrne and George Staphos

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## Ocean Ballroom II/III

1:50 – **Fireside chat with FMC Corp**  
 2:20 p.m. Mark Douglas, *President & CEO*  
 Andrew Sandifer, *Executive Vice President & CFO*

2:30 – **Fireside Chat with Waste Management Inc.**  
 3:00 p.m. Davina Rankin, *Executive Vice President & CFO*  
 Tara Hemmer, *Chief Sustainability Officer*  
 Ed Egl, *Senior Director, Investor Relations*

3:10 – **Fireside chat with The Sherwin-Williams Company**  
 3:40 p.m. Jim Jaye, *Senior Vice President - Investor Relations & Corporate Communications*

3:50 – **Panel Discussion: Decarbonization**  
 4:25 p.m. **Air Company**, Gregory Constantine, *Chief Executive Officer*  
**Aqualung Carbon Capture AS**, Erik M Mathiesen, *Chief Executive Officer*  
**Farmers Business Network Inc.**, Amol Deshpande, *Co-Founder & CEO*  
**LanzaTech Inc**, Sean Simpson, *Founder*  
**Moderated by:** Steve Byrne

4:30 – **Panel Discussion: New Sustainability Technologies**  
 5:00 p.m. **Danimer Scientific Inc.**, Steve Croskrey, *Chief Executive Officer*  
**Origin Materials, Inc.**, John Bissell, *Co-CEO, Origin Materials*  
**Avantium N.V.**, Tom van Aken, *Chief Executive Officer*  
**Moderated by:** Steve Byrne & George Staphos

5:30 p.m. **Evening Reception – Conrad Hotel, Poolside**

## Ocean Ballroom I

**Fireside chat with Waste Connections Inc.**  
 Mary Anne Whitney, *Executive Vice President & CFO*

**Panel Discussion: “How are e-commerce, retail and supply-chain trends impacting the outlook for paperboard usage?”**  
**Alternative Paper Solutions**, Ralph A. Young, *Principal*  
**Hudson Windsor**, Ronald Sasine, *Principal*  
*Additional panelist[s] to be announced*  
**Moderated by:** George Staphos

**Panel Discussion: What’s next for containerboard? Growth or a post-Covid hangover?**  
**Alternative Paper Solutions**, Ralph A. Young, *Principal*  
**CRB Consulting**, Carl Bohm, *President*  
**Hudson Windsor LLC**, Ronald D. Sasine, *Principal*  
**Sharp International**, Randy Banks, *President*  
**Moderated by:** George Staphos

**Panel Discussion: Small-cap roundtable, how are two companies trying to leverage opportunities in the pulp and paper sector**  
**Rayonier Advanced Materials Inc.**, Vito Consiglio, *Chief Executive Officer* & Marcus Moeltner, *Chief Financial Officer*  
**Sylvamo Corporation**, Jean-Michel Ribieras, *Chairman & CEO*, John Sims, *Senior Vice President & CFO*, & Hans Bjorkman, *Vice President, Investor Relations*  
**Moderated by:** Fitz Middleton, *BofA Materials & Industrials Specialist Sales*

**Fireside chat with LyondellBasell Industries NV**  
 Jim Guilfoyle, *Executive Vice President, Advanced Polymer Solutions & Global Supply Chain*

# 2022 Global Agriculture & Materials Conference Agenda

## Thursday, March 3

7:00 a.m. Breakfast and Registration - Ocean Ballroom Foyer

### Ocean Ballroom II/III

7:30 – 8:00 a.m. *Presentation to be announced*

8:10 – 8:40 a.m. **Fireside chat with PotlatchDeltic Corp**  
Eric Cremers, *President & CEO*

8:50 – 9:20 a.m. **Panel Discussion: Renewable Fuel**  
**CoverCress**, Mike DeCamp, *Chief Executive Officer*  
**Green Plains Inc.**, Todd Becker, *Chief Executive Officer*  
**LanzaJet**, Jimmy Samartzis, *Chief Executive Officer*  
**Raizen**, Ricardo Mussa, *Chief Executive Officer*  
**Vertimass**, John R. Hannon, PhD, *Chief Operating Officer*  
**Moderated by:** Steve Byrne

9:30 – 10:00 a.m. **Fireside chat Archer-Daniels-Midland Co**  
Vikram Luthar, *Senior Vice President Head of Investor Relations & Chief Financial Officer, Nutrition*  
Greg Morris, *President & SVP AG & Oilseed*

10:10 – 10:40 a.m. **Fireside chat with Element Solutions, Inc.**  
Benjamin Gliklich, *Chief Executive Officer*

10:50 a.m.– 11:25 a.m. **Panel Discussion: New Technologies in Seeds**  
**Cibus Corp**, Peter Beetham, *Chief Operating Officer*  
**Inari Agriculture, Inc.**, Stuart Brown, *Chief Financial Officer*  
**Pairwise Plants LLC**, Tom Adams, *Chief Executive Officer*

11:30 a.m.– 12:00 p.m. **Panel Discussion: Lithium**  
**Benchmark Mineral Intelligence Ltd**, Andrew Miller, *Chief Operating Officer*  
**Energy Exploration Technologies Inc.**, Teague Egan, *Chief Executive Officer*  
**Lithium Americas Corp**, Jonathan Evans, *President & CEO*  
**Sigma Lithium Corporation**, Ana Cabral-Gardner, *Co-CEO*  
**Standard Lithium Ltd**, Andy Robinson, PhD, *President, Director & COO*  
**Moderated by:** Steve Byrne & Matthew Deyoe

12:10 – 1:40 p.m. **Luncheon Presentation: Panel Discussion: Activist Investing | Ocean Ballroom II/III | Moderated by:** Steve Byrne  
**BofA Securities**, Amy Lissauer, *Managing Director, Global Head of Activism and Raid Defense*  
**Olshan Frome Wolosky LLP**, Elizabeth Gonzalez-Sussman, *Partner, Head of ESG Investing*  
**Vinson & Elkins**, Lawrence Elbaum, *Partner — Shareholder Activism*

1:50 – 2:20 p.m. *Presentation to be announced*

2:30 – 3:00 p.m. **Fireside chat with Atlantic Sapphire**  
Karl Oystein Oyehaug, *Chief Financial Officer*

3:10 – 3:40 p.m. **Fireside chat with Avery Dennison Corp**  
Mitch Butier, *Chairman, President & CEO*

### Ocean Ballroom I

**Fireside chat with Packaging Corp of America**  
Mark Kowlzan, *Chairman & CEO*

**Panel Discussion: Consumer – what’s the outlook for center-of-store and consumer buying trends, post-pandemic?**  
**National Supermarket Cooperative Corporation**, George Gue, *President & CEO*  
**BofA Securities**, Bryan Spillane, *Lead Analyst – US Consumer Staples*  
**Moderated by:** George Staphos

*Presentation to be announced*

**Fireside chat with O-I Glass Inc.**  
John Haudrich, *Senior Vice President & CFO*

**Fireside chat with WestRock Co**  
Alex Pease, *Executive Vice President & CFO*

**Fireside chat with Crown Holdings**  
Timothy Donahue, *Chief Executive Officer*  
Kevin Clothier, *Chief Financial Officer*  
Thomas Fischer, *Vice President, Investor Relations & Corporate Affairs*

**Panel Discussion: Recovered fiber pricing – will OCC be in the “Roaring ‘20s” or a depression?**  
**Sonoco Products Company**, Palace Steps, *President of Sonoco Recycling*  
**Fastmarkets RISI**, Greg Rudder, *Managing Editor, PPI Pulp & Paper Week*  
**Moderated by:** George Staphos and Mike Feniger

**Fireside chat with Sonoco Products Company**  
Howard Coker, *President & CEO*

**Fireside chat with AptarGroup Inc.**  
Bob Kuhn, *Chief Financial Officer*  
Dan Ackerman, *Corporate Controller*

**Fireside with GFL Environmental Inc.**  
Patrick Dovigi, *Founder & CEO*  
Luke Pelosi, *Executive Vice President & CFO*

# 2022 Global Agriculture & Materials Conference Agenda

## Management Attendees from Companies Hosting One-on-One meetings only:

### **Amcor Plc**

Ron Delia, *Chief Executive Officer*

Tracey Whitehead, *Global Head of Investor Relations*

### **Boise Cascade Co**

Nate Jorgensen, *President & CEO*

Kelly Hibbs, *Senior Vice President & CFO*

### **Bunge Ltd**

Mark Haden, *Vice President, Investor Relations*

Ruth Anne Wisener, *Vice President, Investor Relations*

### **Celanese Corp**

Chuck Kyrish, *VP Financial Planning and Analysis, Acetyls*

Tom Kelly, *Senior Vice President, Engineered Materials*

### **Clariant International AG**

Stephan Lynen, *Chief Financial Officer*

Andreas Schwarzwaldner, *Head of Investor Relations*

### **INNOVATE Corp**

Avie Glazer, *Chairman of the Board*

Wayne Barr, *Chief Executive Officer*

Mike Sena, *Chief Financial Officer*

### **International Flavors & Fragrances Inc**

Michael Deveau, *Chief Investor Relations & Communications Officer*

Michael Bender, *Director, Investor Relations*

### **Israel Chemicals Ltd**

*Participants to be announced*

### **Linde**

Juan Pelaez, *Investor Relations*

### **Lithium Americas Corp**

Jonathan Evans, *President & CEO*

Alec Meikle, *Vice President, Corporate Development*

Ginny Morgan, *Senior Director, Investor Relations and ESG*

### **The Mosaic Company**

Paul Massoud, CFA, *Vice President, Investor Relations*

### **OCI NV**

Hans Zayed, *Director of Investor Relations*

### **Olin Corporation**

Todd Slater, *Chief Financial Officer*

Steve Keenan, *Director of Investor Relations*

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**Orbia Advance Corp SAB de CV**

Gerardo Lozoya, *Investor Relations Director*

**Sao Martinho SA**

Felipe Vicchiato, *Chief Financial Officer*

**Sigma Lithium Corp**

Ana Cabral-Gardner, *Co-Chief Executive Officer*

Daniel Abdo, *Investor Relations*

**Univar Inc**

Nick Alexos, *Executive Vice President & CFO*

Owais Yusuf, *Senior Manager, Investor Relations*

**Venator Materials PLC**

Simon Turner, *President & CEO*

Kurt Ogden, *Executive Vice President & CFO*

## Companies participating in field trips:

Pre-Conference Salmon Field Trip with **Atlantic Sapphire**

Post-Conference Agriculture Field Trip with **MOSAIC SICAV**

## Friday, March 4 – Virtual Day

### Companies participating in virtual 1x1 meetings on Friday, March 4:

**Braskem SA**

Pedro Freitas, *Chief Financial Officer*

Rosana Cristina Avolio, *Investor Relations Director*

**Methanex Corporation**

John Floren, *President & CEO*

Rich Sumner, *Senior Vice President, Global Marketing & Logistics*

Sarah Herriott, *Director, Investor Relations*

**PhosAgro PJSC**

Alexander Sharabaiko, *Deputy CEO for Finance & International Projects*

Sergey Kudryashov, *Head of Sustainable Development*

Andrey Serov, *Head of Investor Relations*

**Republic Services Inc**

Brian DelGhiaccio, *Executive Vice President & CFO*

**SABIC (Saudi Basic Industries Corp)**

*Participants to be announced*

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