



The Sulphur Institute is the global advocate for sulphur, representing all stakeholders actively engaged in producing, consuming, marketing, handling, transporting, or adding value to sulphur. Learn more about TSI membership and its programs at:

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TSI's Sulphur World Symposium 2017

Abstract Brochure

Tuesday - April 25, 2017



The Global Economic Outlook with a Focus on Risks and Policies

Rodolphe Blavy, International Monetary Fund

Rodolphe Blavy will present the global economic outlook and the key challenges to a sustained recovery - following the release of the International Monetary Fund's updated World Economic Outlook at its annual Spring Meetings.



Energy Market Trends & the IMO 2020 Global Sulphur Cap

Olivier Kenter, Shell

After a short overview of current energy market trends, the presentation will provide Shell's perspective on the International Maritime Organisation's decision to significantly reduce the Sulphur content of the fuel oil used by ships by 2020. What choices do ship owners have to navigate this unprecedented change, and how does this impact the refining industry?



Prospects for Sulphur Transportation Costs: Is the dry bulk freight market about to pounce?

Marc Pauchet, Maersk

This presentation will provide a look at where sulfur lies in the global dry bulk freight market and the demand outlook. A profile for dry bulk vessel supply will be given with an emphasis on smaller ships. New regulations impacting the industry scheduled for implementation will be highlighted.



Sour Gas Projects Update

Richard Hands, Editor, Sulphur Magazine, BCInsight Ltd

A review of the progress of a number of sour gas projects across the Middle East, Central Asia and China, which are collectively delivering a large boost in sulphur production; a boost which has pushed the market into surplus. But in a world of cheap oil and gas, are the additional costs that sour gas projects face still justifiable? Is this likely to be a one-time addition, or will it lead to a more sustained growth in sulphur output?

Wednesday - April 26, 2017



Sulphur Fertilizer Market Potential

Peter Harrisson, CRU

The changing landscape of environmental protection has developed a specific issue in the supply of sulphur nutrient to the global agricultural sector. The decline in SO₂ emissions from vehicles, industrial processes, power generation and metals production has cut the “natural” supply of sulphur to the world. This decline in supply has coincided with a significant increase in the intensity of agriculture and thus the extraction of sulphur nutrient from the environment. The combination of declining supply and increasing demand has triggered nutrient shortages which are preventing crops from reaching the highest potential yield. Sulphur nutrient deficiency has been a long held issue in the world but the uptake of products that alleviate this shortage has been slow. In recent years this slow uptake trend has been changing with some very significant growth in certain product groups and certain markets. This presentation will look at CRU's assessment of how the agricultural demand from sulphur has developed along with how the fertilizer supply side can react in response. The outlook for different sulphur enhanced fertilizer products will be explored and a view of the opportunities offered by specific market and products segments discussed.



Key Changes in the Global Phosphates Market & Implications for the Sulphur Market

Mike Nash, Argus Media Limited

In this presentation, Argus Phosphates editor Mike Nash gives his view on changes in the global phosphates market, the new sales strategies adopted by the supply side and drivers of recent changes in trade patterns. From vertical integration along the supply chain as producers seek to garner market share in key markets, the changing role of traders within the industry to greater consolidation on the supply side and the rise of China as a dominant phosphates exporter, as well as increased regionalisation in trade and the redrawing of the global phosphates map, Mike takes us through the key trends, the fundamental reasons behind them and what it means for the future.



Global Sulphur & Sulphuric Acid Outlook

Fiona Boyd & Freda Gordon, Acuity Commodities

Acuity's presentation will analyze changes in sulphur supply and demand and their subsequent impact on the market, including trade flows. Examples of supply changes include Kashagan in Kazakhstan beginning to produce in 2017 after years of delays. We will also focus on changes in infrastructure such as new forming capacity coming online in Canada this year. Trends to watch will also be reviewed, including a shift in the European market resulting in potential solid sulphur melter and forming projects.



For sulphuric acid, similar topics will be explored including the impact of increased sulphur-based production on the traded smelter acid market. On the infrastructure side, changes such as new import tank capacity will be reviewed. Changes in global acid supply and demand will also be covered as well as the outlook for key import regions such as Morocco and the US. We will also focus on regional trends such as supply from smelters in Japan/ South Korea staying closer to home in the southeast Asia region reducing exposure to further long haul markets such as Chile. The import deficit in Latin America will also be examined including expected higher requirements for markets such as Argentina and Mexico.

