PROGRAMME OVERVIEW*

Welcome Reception – Monday 19th May 2014

18:00 – 21:00  Registration & Gala Reception hosted by Singapore Exchange

Day One - Tuesday 20th May 2014

8:00  Registration

8:50  Chairperson’s & Secretary-General’s Welcome Address

9:00  Guest of Honour Opening Address

KEYNOTE SESSION

9:20  Key Note Speech - Sustainability: Our Investment for a Thriving Industry
The global rubber industry is currently presented with an opportunity to enter into another belle époque. To grasp it takes the combined efforts of the entire value-chain, coming together to invest in a sustained and thriving future.

9:50  Automotive Industry Trends and Their Potential Impact on Rubber
Mega trends are driving the automobile industry and the questions that arise in their regard and how they are addressed will in turn drive changes in the rubber industry in the coming decade. Thus, what are the two whats, one how and one change?

10:20  Networking Morning Refreshments

OUTLOOK FOR THE RUBBER INDUSTRY

11:00  Global Economy
The global economy appears now to be on a firmer footing, with international financial institutions revising up their outlook, however there still remains structural flaws and policy constraints that hinder more investment and faster productivity growth in mature economies, while the emerging economies are headed towards a more balanced growth model. How bright is the future, or is this another false-dawn?

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11:30  The Trouble with the S Curve
Underneath the headlines of sales and production lie the beating heart of the automobile industry, the 1.6 billion vehicles on our roads today. The emerging markets are on the growth path, while the mature markets are either at saturation level or on a declining path. How far and fast will the vehicles in use move along the curve, and what impact will it have on the mobility of tomorrow?

12:00  The Shape of Things to Come - Outlook for Tyres and Rubber
The tyre industry has been through a wild roller-coaster of a ride in the recent past, plunging into negative growth and shooting through to double digit growth. What has been the impact of these wild fluctuations and how will it affect the outlook for the tyre industry and demand for rubber?

12:30  Networking Lunch

14:00  Go West! - Coming to America
The USA is the single largest market for tyres and the second largest for rubber consumption, but it has been overlooked in recent years in the wake of stirring of the slumbering potential giants from the East. However, there have been new found favours, with old and new pioneers arriving from East. An insight into the changes that brought about the turnaround and the outlook for the future.

14:30  North by Northeast and the Great Expectations
North of the Adriatic and East of the Elbe there exists Europe, also. It is economically dynamic, large in populous and have been subject to sustained high level of investments over the past twenty years. How will the growth of rubber industry of this region develop and what will be the overall impact on Europe?

15:00  Opportunities and Challenges for Asia Rubber - Perspective on China and India
New leadership is now in place and with a more sombre outlook for the economy in China, while India has just endured lowest economic expansion in a decade. Natural rubber environment could radically change, with swath of synthetic rubber capacity expansions brought online in 2014-15 in both countries. What holds for the near future of these Juggernauts of the Rubber World? What holds for the near future of these Juggernauts of the Rubber World?

15:30  Keep on Rolling: the Steel Core of the Automotive Industry
Many thousands of parts go into constructing an automobile and integral to the high performance demanded by the industry, while keeping with consumer demands for sustainable development is the wire. In this high demanding environment, what investment is the wire industry making to ensure that the automotive industry keeps on rolling?

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Day One - Tuesday 20th May 2014

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| 16:30 | **5g of Separation - Changing Face of the Rubber Gloves Industry**
      | Currently on the growth phase, the rubber gloves industry has and is projected to continue grow at double digit rate. It is, nevertheless, at a crossroads faced with challenges of alternative materials, changing consumer preferences, labour shortages and environmental concerns. How is the industry facing up to these? |
| 17:00 | **The Rubber Outlook to 2016**
      | Pulling it all together, based on the macro-economic expectations plus supply and demand forecasts what scenarios can we paint for rubber in the next couple of years? |
| 17:30 | **Panel Discussion - Synthetic Rubber Sustainability Perspective** |
|       | Closing Remarks and End of Day One                       |
| 18:00 | Cocktail Networking Reception hosted by IRSG
      | Exhibition Hall                                          |

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Day Two - Wednesday 21st May 2014

8:50  Chairperson’s Opening Remarks

SUSTAINABLE RUBBER - NEUTRAL PERSPECTIVE

Sustainability in the rubber industry and the wider issue of sustainable development are subjects that are high on the minds of all those involved in the industry, be they producers or consumers of rubber and related products. Initiatives/actions have been launched and taken along and across the industry’s value chain, which raises the question: how are they perceived?

9:00  Sustainability, Risk and Environmentalism in the Tyre and Rubber Industry

Discussing the different meanings of Sustainability - the business community wants to minimise the risks to their businesses over the long term while the environmentalists hope to reduce impact on the planet. The topic aims to find a path to meet both needs.

9:30  Horizontal Perspective: Producers-Consumers

Sustainability initiatives have envisioned impacts on the development policies of the producer economies. Such initiatives offer opportunities for improving productivity, market access and net income of producers. As commercial imperative, market demands use of sustainable raw materials. Sustained interest from consumers under new approach to ‘CSR’ demands ensuring sustainability in its supply chain.

10:00  Parallel Perspective: Stories from Across the Shallow Divide

Perception of sustainability varies across different value chain players across commodities. Success in promoting the Three ‘P’s under various commodity initiatives is attainable through supply chain cooperation. What needed to stay ahead in the future is an open dialogue for commitment from all supply chain players.

10:30  Networking Morning Refreshments

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Day Two - Wednesday 21st May 2014

BACKOFFICE OF THE RUBBER INDUSTRY

11:00  Funds and Trading in Rubber Futures

11:30  New Mandate in Financing Development Projects - Common Funds for Commodities' Position
From the initiative to dampen fluctuations in commodity prices through interventions of commodity organisations emerged CFC. Direct interventions were tried, but it is no longer considered a viable option. Alternatives are to reduce the impact of price fluctuations on the lives of poor producers and consumers. Against this background, the Members of the CFC are consulting on the future role and mandate of the Fund. What will be the impact of the changes on financing rubber projects?

12:00  Field of Dreams - Practical Experiences of Natural Rubber Production
Land acquired, planting material sourced, labour hired, land prepared, rubber trees planted etc. The steps taken prior to rubber being delivered to the doorsteps of rubber products manufacturers are numerous and to each are attached experiences. What are they and what lessons can we learn from them?

12:30  Networking Lunch

SUPPLY-SIDE OF RUBBER INDUSTRY

14:00  Butadiene - Making Light of the Tight Situation?
In the Middle-East, the petrochemical industry is being forced to move away from their advantaged light feedstock, the US is committed to rejuvenating their industry on the back of shale gas, while Europe is contemplating exploiting overabundance of ethane gas in North America to maintain their industry. How will all these factors play out over the 2014-15 horizon, and how will they affect the global butadiene demand/supply situation?

14:30  Reclaimed Rubber: End-of-Life-Tyres
Reclaimed rubber is the third leg of the rubber industry, supplying it with economically valuable product. It is an industry, however, that is not well understood. Confusion reign in regards to what it is, the size and the source of demand. Time has arrived for light to be thrown on this industry.

15:00  Where's My Ship, Dude? - Logistics of Rubber Trade
Logistics is a vital part of the global rubber industry, linking the supply to the demand that is often oceans apart. Rubber must compete with other commodities as well as other products while keeping in mind the relatively low value of the cargo. So, what are the vital issues confronting the logistics of the rubber industry?

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15:30  Rise of the Machinery - Evolution of Rubber Processing Equipment
The location, methodology and the destination of final consumption of natural rubber have hardly changed in the last one hundred years: it is still mainly produced 15 degrees either side of the equator, the bark of the tree is cut and it ends up mostly in tyres. However, the demands upon machineries that transform the white liquid have greatly changed, responding to different external and internal pressures through time. How have the machineries changed over time and what and where are the pressures to change coming from?

IRSG’s Road Forward on Sustainable Natural Rubber Programme

16:00  Introduction
Sustainable Natural Rubber Programme of IRSG, including all key players in the global value chain, aimed at promoting a sustainable growth and development for NR industry. Evolution of the global sustainable natural rubber project, involving all supply chain players, announced in the WRS 2013 continued its ongoing Phase 2 actions for developing potential Sustainability Criteria/Indicators to be applied throughout the rubber value chain. Stakeholder dialogue, trust and commitment to this programme, as a way forward, are vital for successful implementation.

16:10  Panel Discussion - Road Forward on Sustainable Natural Rubber Programme

16:40  Chairman’s Closing Remarks

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