

Global Agriculture & Materials Conference | Agenda

Conrad Hotel, Ft Lauderdale FL

Wednesday, February 28



7:00 a.m. – Registration & Breakfast – Sirocco Room, 2nd Floor 8:30 a.m.	
7:15 a.m. – Welcome Note – BofA Global Research Team - Conrad Ballroom 2/3 7:30 a.m. Steve Byrne (US), George Staphos (US), Michael Feniger (US), Cashen Keeler (US), Roger Spitz (US), Dan Lungo (US), and Sal Tiano (US), Isabella Simonato (Brazil), Alexander Jones (EU)	
7:30 a.m. – Keynote with Vanessa Chan from the Department of Energy – Conrad Ballroom 2/3 8:10 a.m. Vanessa Chan, <i>Chief Commercialization Officer and Director of the Office of Technology Transitions</i> Moderator: Steve Byrne, <i>Managing Director & George Staphos, Managing Director, BofA Securities</i>	
Track 1 – Conrad Ballroom 2/3 Track 2 – Conrad Ballroom 1	
8:20 a.m. – Hydrogen Panel Discussion 9:00 a.m. Air Liquide , Mike Graff, <i>Executive Vice President Department of Energy</i> , Maressa Brennan, <i>Strategist Nippon Sanso</i> , Raghu Menon, <i>Head of Global HYCO Utility Global</i> , Greg Heinlein, <i>Chief Financial Officer</i> Moderated by: Steve Byrne, BofA Securities	Consumer GLP 1 Panel Discussion High Impact Analytics , Matt Musgrave, <i>Director of Client Growth</i> BofA Securities , Peter Galbo, <i>Director of Research</i> Moderated by George Staphos, BofA Securities
9:10 a.m. – Corteva Inc. 9:40 a.m. Chuck Magro, <i>Chief Executive Officer</i> Sam Eathington, <i>EVP, Chief Technology & Digital Officer</i>	Ardagh Metal Packaging SA Oliver Graham, <i>Chief Executive Officer</i> David Bourne, <i>Chief Financial Officer</i>
9:50 a.m. – Nutrien Ltd. 10:20 a.m. Mark Thompson, <i>Executive Vice President & CCO</i> Jeff Tarsi, <i>Executive Vice President of Retail</i>	Crown Holdings Inc. Kevin Clothier, <i>Chief Financial Officer</i> Thomas Fischer, <i>Vice President IR & Corporate Affairs</i>
10:30 a.m. – Westlake 11:00 a.m. Jeff Holy, <i>Vice President & Treasurer</i>	Graphic Packaging Holding Co. Michael Doss, <i>President & CEO</i>
11:10 a.m. – Panel with: 11:40 a.m. Keytrade , Melih Keyman, <i>Chief Executive Officer</i> EuroChem Americas Corp. , Don Lambert, <i>Chief Executive Officer</i> Moderated by: Steve Byrne, BofA Securities	Ball Corporation Dan Fisher, <i>Chairman & CEO</i> Howard Yu, <i>Executive Vice President & CFO</i>
11:50 a.m. – Luncheon and Sustainable Plastics Panel Discussion – Conrad Ballroom 2/3 1:10 p.m. Berry Global Inc. , Kevin Kwilinski, <i>Chief Executive Officer</i> & Mark Miles, <i>Chief Financial Officer</i> Department of Energy , Katheryn Scott, Dow Inc. , Pankaj Gupta, <i>Vice President Investor Relations</i> Sonoco Products , Howard Coker, <i>Chief Executive Officer</i> Moderated by Steve Byrne, Mike Feniger and George Staphos, BofA Securities	
1:20 p.m. – Seed Panel Discussion 2:00 p.m. Cibus , Greg Gocal, <i>Co-Founder, CSO & EVP</i>	Fireside Lightning Round, with two Dynamic Paper/ Packaging companies

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Corteva, Sam Eathington, *EVP, Chief Technology & Digital Officer*
Pairwise, Tom Adams, *Chief Executive Officer*
Traitology, Fayaz Khazi, *Chief Executive Officer*
Moderated by: Steve Byrne, BofA Securities

Clearwater Paper Corp

Arsen Kitch, *President & CEO along with*
Sherri Baker, *SVP Finance & CFO*

Sylvamo Corporation, John Sims, *Chief Financial Officer*

Moderated by George Staphos, BofA Securities

2:10 p.m. – **PPG Industries Inc.**

2:40 p.m. Tim Knavish, *Chief Executive Officer*

Berry Global Inc.

Kevin Kwilinski, *Chief Executive Officer*

2:50 p.m. – **Arcadium Lithium**

3:20 p.m. Paul Graves, *Chief Executive Officer*

Boxboard: The outlook for demand and supply developments through 2026

Clearwater Paper Corp

Arsen Kitch, *President & CEO along with*
Sherri Baker, *SVP Finance & CFO*

Fastmarkets, RISI, Steve Honeyman, *Sr. Economist*

Moderated by George Staphos, BofA Securities

3:30 p.m. – **Martin Marietta Materials Inc.**

4:00 p.m. Ward Nye, *Chairman, President & CEO*

Jim Nickolas, *Executive Vice President & CFO*

AptarGroup Inc.

Stephan Tanda, *President & CEO*

4:10 p.m. – **Air Liquide**

4:40 p.m. Mike Graff, *Executive Vice President*

Recycling and Recycled Fiber - How are new mills, the Red Sea, and sustainability impacting recycling trends and pricing?

Fastmarkets RISI,

Greg Rudder, *Managing Editor, Pulp & Paper Week*

Sonoco Products

Palace Stepps, *President & General Manager of Recycling*

Moderated by George Staphos & Mike Feniger, BofA Securities

4:50 p.m. – **AgbiInvestor**

5:20 p.m. Allister Phillips, *Chief Executive Officer, Seed Analysis Lead*

Derik Oliphant, *Crop Protection Lead*

Sonoco Products

Howard Coker, *Chief Executive Officer*

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

7:00 p.m.

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Thursday, February 29



7:00 a.m. – **Registration & Breakfast – Sirocco Room**
8:30 a.m.

Track I – Conrad Ballroom 2/3

Track II – Conrad Ballroom I

7:30 a.m. – **Sustainable Aviation Fuel Panel Discussion:**
8:10 a.m. **Adecoagro SA**, Victoria Cabello, *Investor Relations Officer*
Green Plains Inc, Devin Mogler, *SVP Government Affairs, Sustainability & Communications*
LanzaTech Global Inc, Geoff Trukenbrod, *Chief Financial Officer*
Vertimass LLC, John Hannon, *Chief Operating Officer*
Moderated by: Steve Byrne & Sal Tiano BofA Securities

Packaging Corporation of America
Mark Kowlzan, *Chairman & CEO*

8:20 a.m. – **Lithium Panel Discussion**
9:00 a.m. **Lithium Americas Corp**, Jon Evans, *Chief Executive Officer*
Piedmont Lithium Inc, Keith Phillips, *Chief Executive Officer*
Standard Lithium Ltd, Robert Mintak, *Chief Executive Officer*
Sigma Lithium Corp, Matt DeYoe, *Executive Vice President*
Moderated by: Steve Byrne, BofA Securities

Silgan Holdings Inc.
Kimberly Ulmer, *Chief Financial Officer*

9:10 a.m. – **The Mosaic Company**
9:40 a.m. Bruce Bodine, *Chief Executive Officer*
Jenny Wang, *Executive Vice President, Commercial*

International Paper Company
Mark Sutton, *Chairman & CEO*

9:50 a.m. – **CF Industries**
10:20 a.m. Chris Bohn, *Executive Vice President & CFO*
Bert Frost, *Executive Vice President, Sales, Market Development and Supply Chain*

Containerboard: What product, regional and other market trends will help offset recent supply increases?
Alternative Paper Solutions, Ralph A. Young, *Principal*
CRB Consulting, Carl Bohm, *President*
Hudson Windsor, Ronald D. Sasine, *Principal*
Sharp International, Randy Banks, *President*
Moderated by George Staphos, BofA Securities

10:30 a.m. – **Pilbara Minerals**
11:00 a.m. Dale Henderson, *Chief Executive Officer & MD*

No Session

11:10 a.m. – **Element Solutions Inc.**
11:40 a.m. Ben Gliklich, *Chief Executive Officer*

Republic Services Inc.
Brian DelGhiaccio, *Chief Financial Officer*

11:50 a.m. – **Luncheon & Shareholder Activism Panel**
1:10 p.m. **Olshan Frome Wolosky LLP**, Elizabeth Gonzalez-Sussmam, *Vice Chair, Shareholder Activism Practice*
Sidley Austin, Kai Liekefett & Derek Zaba, *Co-Chairs, Shareholder Activism and Corporate Defense Practice*
Collected Strategies, Nick Lamplough & Jim Golden, *Partners*
Moderated by Amy Lissauer, Bank of America

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1:20 p.m. – 2:00 p.m.	Biologics Panel Discussion BioConsortia , Marcus Meadows-Smith, <i>Chief Executive Off</i> Oerth Bio LLC , John Dombrosky <i>Chief Executive Officer</i> Pivot Bio , Ernie Sanders, <i>Senior Vice President</i> , <i>Product Innovation</i> Moderated by: Steve Byrne, BofA Securities	O-I Glass, Inc. John Haudrich, <i>Senior Vice President & CFO</i>
2:10 p.m. – 2:40 p.m.	FMC Corp. Andrew Sandifer, <i>Chief Financial Officer</i>	Waste Connections Inc. Mary Anne Whitney, <i>Chief Financial Officer</i>
2:50 p.m. – 3:20 p.m.	Nippon Sanso Holdings Corporation Alan Draper, <i>Chief Financial Officer</i> Raghu Menon, <i>Head of Global HYCO</i>	GFL Environmental Inc. Patrick Dovigi, <i>Founder & CEO</i> Luke Pelosi, <i>Executive Vice President & CFO</i>
3:30 p.m. – 4:00 p.m.	Green Plains Todd Becker, <i>President & CEO</i>	
4:00 p.m.	Conference Concludes	

Companies participating in 1x1 meetings only:

Akzo Nobel NV
Avery Dennison Corporation
Axalta Coating Systems Ltd.
Bunge Global SA
Israel Chemicals Ltd.
Lavoro Ltd.
Linde
Nippon Paint Holdings
Novozymes A/S
Olin
Orica Ltd.
Potlatch Deltic Corp.