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## Diesel Exhaust Fluid Forum

October 8-9 2009

Mandalay Bay Hotel, Las Vegas, NV

# Post Conference Report

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## Table of Contents

Conference Summary	3
Speakers	4
Delegate Analysis	5-6
Testimonials	6
Attendees	7-12
The Integer conference team	13

# DEF Forum 2009 Overview

Despite recent economic challenges the inaugural Diesel Exhaust Fluid Forum recorded excellent numbers with over 200 delegates attending the two day conference in Vegas. Stakeholders representing the entire Diesel Exhaust Fluid (DEF) supply chain gathered to discuss market growth and opportunities for 2010.

## Day 1

The conference began with a market overview from Dr. Elmar Boeckenhoff, Senior Vice President Engineering & Technology, Daimler Trucks North America LLC who spoke of how DEF suppliers, truck manufacturers and fleet operators can co-operate to offer timely, relevant and accessible information to DEF vehicle users.

Day one continued with a panel discussion on the regulatory background to vehicle emissions control from 2010 presented by Richard Moskowitz, Vice President & Regulatory Affairs Counsel, American Trucking Association and Dr. Manfred Schuckert, Company Strategist, Emissions & Safety for Commercial Vehicles Daimler AG which explored how upcoming CO2 regulations will influence SCR technology development, fuel economy and aftertreatment.

The later sessions of the day continued to investigate SCR usage within medium and heavy duty truck fleets. FedEx, Ryder and Swift discussed strategy, challenges and potential costs faced in the US, followed by panel discussions on the potential of retrofit markets for SCR equipment, how diesel particulate filter technology impacts on SCR investment decisions and emissions technology choices for off-road vehicles.

## Day 2

Day two focused more on DEF storage, supply and distribution and the morning began with Chad Dombroski, Director Air1, Yara, North America discussing how US enterprises will transform DEF infrastructure from introductory supply arrangements to a mature and profitable industry. Chuck Mattina, President & COO of the Quixote Group looked more closely at EPA 2010 analyzing diesel exhaust fluid (DEF) distribution requirements for the vocational market while Yara, Old World, BB Pumps, Potash, Airgas and Brenntag scrutinized the business drivers of DEF distribution and availability.

The first afternoon session – ‘The future of DEF at the truck stop: how will the market develop?’, was moderated by Holly Alfano, Vice President of Government Affairs, NATSO, and supported by key panelists from Pilot Travel Centers, Gilbarco Veeder Root, Travel Centers of America and SPATCO DEF. The session discussed how many truck stops sell DEF today and how many will be selling DEF by October 9, 2010? What types of filling equipment will independents need and what impact will DEF supply have on station configuration? How easily can DEF supply be integrated with fuel card systems and what opportunities does the DEF market present for enhanced customer loyalty? How will large-scale truck stop operators plan and implement DEF supply nation-wide, in order to satisfy heavy-duty SCR diesel truck demand?

Organizers Integer were delighted with the turnout; newly appointed Vice President for North America David Uschwald said “Despite the enormous challenges many businesses are facing in this tough climate, diesel exhaust fluid (DEF) is a growing market and we are pleased to support and bring together the various sectors to help drive this growth”.

All presentations are now available to purchase online at our website [www.integer-research.com/deff09](http://www.integer-research.com/deff09)

Best regards

Amy Woolmer  
General Manager - Conferences  
Integer

**Diesel Exhaust Fluid Forum 2009 featured the following high level panel of speakers:**

Steve Sturgess, Executive Editor, **Heavy Duty Trucking**

Dr. Elmar Boeckenhoff, Senior Vice President Engineering & Technology, **Daimler Trucks North America LLC**

Oliver Dixon, Analyst, **World Truck Analysis**

Clifford Dean, Senior Advisor, Compliance & Innovative Strategies Division, **Environmental Protection Agency**

Richard Moskowitz, Vice President & Regulatory Affairs Counsel, **American Trucking Association**

Dr. Manfred Schuckert, Company Strategist, Emissions & Safety for Commercial Vehicles, **Daimler AG**

David McKenna, Director, Powertrain Sales & Marketing, **MACK Trucks**

Michele T. Calbi, Vice President, Procurement & Shop Operations, **Swift Transportation Co.**

Doug Werts, Senior Manager, Program Management Office, Global Vehicles, **FedEx**

Scott Perry, Group Director, **Ryder**

Steve Russell, Alternative Transportation Program Coordinator/Mass Clean Cities, **Massachusetts Department of Energy Resources** (previously working as Fleet Superintendent, Fleet Services, City of Keene)

Tim Cheyne, Director, **Integer**

Joe Biluck Jnr. Director of Operations and Technology, **Medford Township Education Board**

Bryan Flansburg, Director Transportation Services, **University of Colorado**

David Siler, Director of Marketing, **Detroit Diesel**

K.C Hall, Director - Business Development, **Cummins Filtration**

Kent Robinson, Director of Marketing, **Dresser Wayne**

Lutz Lehmann, CEO, **Baumot**

Ian MacDonald, Business Development, **Engine Control Systems**

M. A. Mannan, Business Manager, **Nett Technologies Inc.**

David Siler, Director of Marketing, **Detroit Diesel**

Mr. Tim Jackson, Senior Vice President, **Tenneco Inc.**

David Uschwald, Vice President, North America, **Integer**

Dr. Tue Johannessen, Chief Technology Officer, **Amminex A/S**

Chris Benner, Vice President of Sales and Marketing, **NxtGen Emission Controls**

Margaret Sullivan, Director of Emissions Compliance, **PACCAR**

Zack Ellison, Director, Customer Technical Support & Industrial OEM Support, **Cummins Inc.**

Vishal Singh, Manager Business Operations, **Eaton Corporation**

Matt Rushing, Director, Product Management, Tractors, **AGCO Corp**

Chad Dombroski, Director Air1, **Yara, North America**

Douglas S. Haugh, Executive Vice President & CIO, **Mansfield Oil Company**

Chuck Mattina, President & COO, **Quixote Group**

Rolf Isberg, Vice President, **Yara, North America**

Dr Frank Cook, Senior Vice President, Technical, **Old World Industries**

Edu M. Bury , Co-founder of GreenChem / Director of **BB Pumps & Parts**

Bernie Rock, Vice President Industrial Sales, **Potash Corp**

Jodi Crawford, Business Development Manager, **Airgas**

Mike DelliCompagni, Director of Sales/ DEF, **Brenntag North America**

Holly Alfano, Vice President of Government Affairs, **NATSO**

Bill Mulligan, Vice President, Development, Facilities & Environmental, **Pilot Travel Centers**

Richard Browne, Vice-President of Marketing, North America, **Gilbarco Veeder Root**

Tom Komos, Vice President, Fuel Supply, **Travel Centers of America**

Matt Jenkins, Vice President, Business Development, **SPATCO DEF**

John Barrington, Type D - Product Manager, **Thomas Built Buses**

Bryan Gran, Vice President, Industrial Services, **Micro Matic**

Anders Hedgren, Director, Strategy & Finance, **Identic AB**

Vijay Srinivasan, President & COO, **Balcrank Corporation**

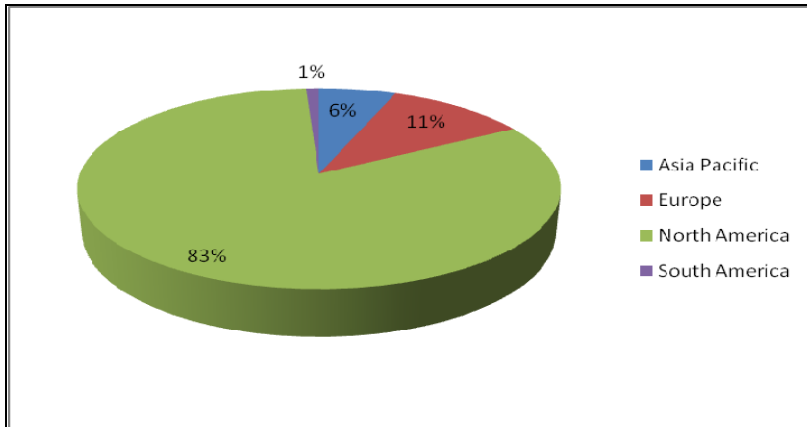
Dave Polak, President, **Blue1 USA**

Tim Tice, Engine Oil Licensing Program Manager, **American Petroleum Institute**

## Delegate Analysis

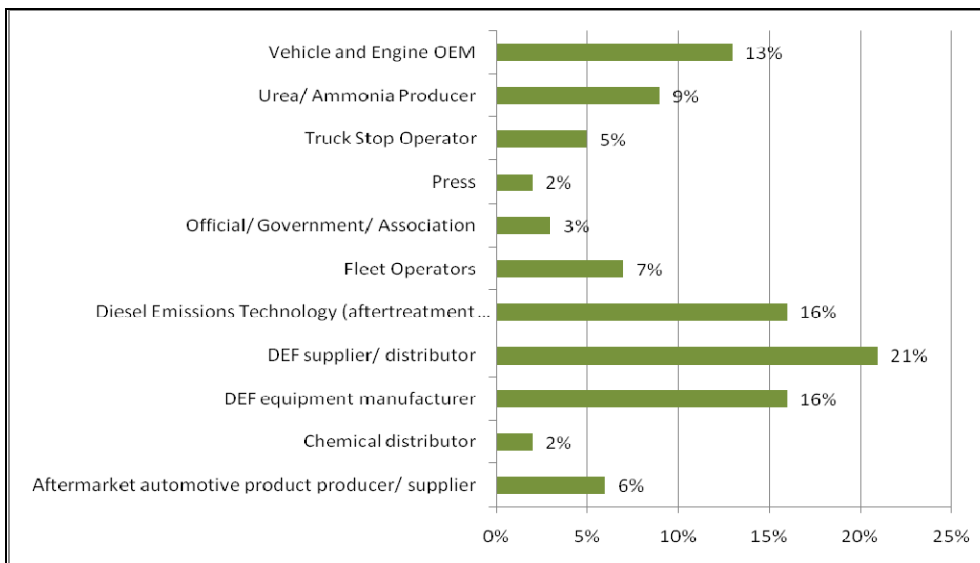
### Geographic Breakdown

The conference was attended by over 200 conference delegates from around the world. As expected there was a significant presence from the United States of America and Canada. The European presence was largely made up of Norwegian and German attendees.



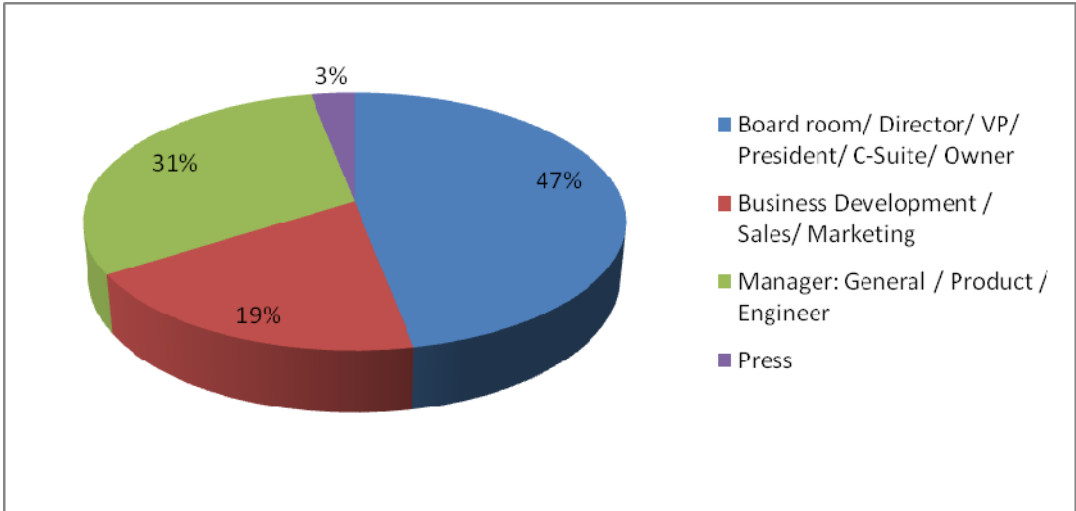
### Company Breakdown

Conference delegates came from across the entire DEFF supply chain. Notable groups of attendees included; Urea producers and DEF suppliers/distributors (40%), DEF component suppliers (29%), Catalyst Exhaust System and other Component Suppliers (29%). Attendees were mainly senior level decision makers.



### Job title breakdown

Notable job specialisations were senior executives as well as sales, marketing and business development and technical specialists. Feedback indicated that there was a good balance of delegates from across the industry to promote a hugely productive networking experience.



**Testimonials**

“The DEF Forum brings together the entire supply chain which is critical to understand the challenges of today and more so the challenges of tomorrow.”

**Jeffrey Ostrander, Con-Way.**

“Most comprehensive conference on current state of DEF market.”

**Joseph Hiznay, Colonial Chemical Company**

“Informational forum focused on increasing awareness of DEF requirements, proliferation, and industry concerns.”

**Dee Wise, MTU Detroit Diesel**

“The panel I was on was especially well put together and I would also like to participate in the next panel discussions.”

**Matt Jenkins, SPATCO DEF**

“Great for learning requirements, desires and concerns for the market.”

**Don Crowder, Liquid Controls Group**

“The DEF Forum was once again an invaluable source of information on the developing DEF market. There is a range of speakers that covers the entire value chain from engine & truck OEM’s, to DEF producers to end customers. The conference is truly a complete package of information.”

**Jared Parsons, Caterpillar**

“An excellent opportunity to hear from experts in their industry and develop beneficial business relationships through a great balance of presentations and networking.”

**Geoff Bohlender, PPC Lubrications**

Very Informative and worthwhile

**Ron Jurek, Heil Trailer International**

A must attend for anyone wanting to learn about DEF manufacture, certification, distribution, and end use. Anyone who is involved with DEF/ SCR or 2010 should attend this forum. Very informative. Two days of intensive information about DEF.

**Ken Claar, Claar Enterprises**

## **Integer's Conference Team**

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