



TRAINING-WORKSHOP

KEEP AHEAD IN A CHANGING AFRICAN DOWNSTREAM MARKET

Venue: ARDA Headquarter, Cocody, Abidjan

Date: from December 02nd to December 03rd 2025

Objective of the training :

During these two days, the training will be focused particularly on understanding the downstream market, downstream margin determination, clean cooking promotion in SSA, and how to solve infrastructure challenges in Africa.

Target profile of the training:

Regulators, refiners, importers, distributors, traders, storage companies, transporters, accountants/financial analysts, strategy professionals.

Facilitators :

James McCullagh, CITAC

Jeremy Parker, CITAC

PROGRAMM

Tuesday, December 02th :

Morning :

Determining Downstream Margins: Finding the Right Balance

- Determining Downstream Costs and Margins:
 - o Principles
 - o Challenges
 - o Approach
- Case Study: Modeling a Service Station in South Africa
 - o RAS System
 - o Creating a Benchmark Asset

Déjeuner

Afternoon :

Understand the downstream market: Africa's changing refining landscape and the impact on trade flows

- Recap of refinery startups and closures
- Yields vs Demand
- Impact of new refineries on trade flows
- Financing
- Challenges and opportunities for African refiners
- Impact of tightening specifications
- Case study: Dangote
- Future projects

Wednesday 3th december :

Morning

How to solve infrastructure challenges in Africa: key developments and practical solutions

- Identifying opportunities
- Bottlenecks vs excess infrastructure
- Key considerations
- Policy-driven infrastructure
- New developments
- LPG: A new market
- Case studies

Lunch

Afternoon

The Realities of Promoting Clean Cooking in Sub-Saharan Africa

- What is Clean Cooking?
- Barriers to LPG Adoption
- Economics of LPG Infrastructure
- Case Studies (Bulk Storage, Filling Plants)



James McCullagh, Executive Director

James has over 15 years of experience in the oil and gas business, gained predominantly in the African downstream. He has particular expertise in investment appraisal, competition analysis, price build-ups and clean cooking, having worked on multiple projects for IOCs, DFIs, trading houses and other companies, and has travelled extensively in West and Central Africa. James worked as a Senior Analyst for CITAC between 2008 and 2015, and rejoined the company in 2019 as a Director. He is a Chartered Management Accountant and fluent French speaker.



Jeremy Parker, Head of Business Development

Since joining CITAC in 2013, Jeremy has both led and supported a wide range of consulting projects on the African continent including market entry, feasibility, best practise and market intelligence studies. Jeremy has developed detailed expertise in West and Central African downstream market dynamics and covers these extensively in CITAC's reports, as well as providing support on these markets to CITAC's retainer clients.

Prior to joining CITAC, Jeremy worked at PFC Energy (now IHS) in Paris as a downstream energy market analyst. Jeremy speaks English, French & Russian.