Frost & Sullivan's
Chemicals, Materials and Food Practice

Meet The Team

March 2011

FROST & SULLIVAN

The Chemicals, Materials and Food Practice is a global team which focuses on the influence of 4 universal mega trends on 5 programme areas

The need to enhance **functionality & performance**

Improvements in **health & wellness**

Chemicals & Materials in Food, Drugs & Cosmetics

Chemicals & Materials in Transportation

Chemicals & Materials in Construction & Utilities

Chemicals, Materials & Food

Food & Beverage Ingredients

Personal Protective Equipment (PPE)

Globalisation of people, products and processes

Development of a **low carbon economy**

Programme Managers

The following slides give biographies and contact details for each of the programme managers in Frost & Sullivan's Global Chemicals, Materials & Food Practice

Sangeetha Srinivasan

Sangeetha Srinivasan
Global Programme Manager, Food and Beverage Ingredients

Frost & Sullivan
South Asia
Chennai, India

Contact Details
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Functional Expertise

- Ten years of food & beverage industry expertise, which includes five years each from the food & beverage and market research & consulting spaces. Particular expertise in:
  - Nutraceuticals – trend analysis
  - Business opportunity assessment & analysis
  - Competitive benchmarking
  - Market entry & expansion strategies
  - Due diligence

Industry Expertise

- Experience base covering a broad range of sectors, leveraging long-standing working relationships with leading industry participants' Senior Executives
  - Functional ingredients & food additives
  - Medical foods
  - Animal nutrition

What I Bring to the Team

- Techno-commercial skills
- Thought leadership
- New product ideation, conception, strategizing & execution
- Optimistic attitude

Career Highlights

- Extensive expertise in food & beverage industry covering both B2B and B2C markets
- Sales, product management & marketing experience in several leading national & multi national firms:
  - Novartis Consumer Health, Chennai; Parry Nutraceuticals, Chennai; Tablets India Ltd, Chennai

Education

- M.Sc Food Science & Nutrition from SNDT Women's University Mumbai, India

Robert Outram

Robert Outram
Global Programme Manager, Chemicals & Materials in Transportation

Frost & Sullivan Europe
Oxford, UK

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Functional Expertise

- Robert has 11 years of professional experience in the chemicals sector: as a research scientist, process development chemist and market analyst.

Industry Expertise

- Robert manages a global team of analysts helping chemical industry clients translate trends and developments in the automotive sector into growth opportunities. Areas of expertise include:
  - Electric vehicle batteries
  - Biofuels
  - Automotive plastics & composites
  - Fuels & lubricants

What I bring to the Team

- A solid understanding of chemistry and materials
- Experience of many growth processes including market entry, M&A, market sizing and benchmarking
- Global project management experience

Career Highlights

- Robert has worked on a number of Chemical Consulting projects; from both an investors point of view (Due Diligence) and also from a manufacturing point of view (Market Entry). Selected consulting projects include:
  - R&D Strategy Workshop: Electric Vehicle Batteries
  - Performance Benchmarking: Automotive OEM coatings
  - Benchmarking: Fuel and Lubricant Additives
  - Market Entry: Product Supplies in European Biodiesel Market
  - Due Diligence: UK Biofuels and Animal Feed Markets Analysis
  - Strategic Sourcing: Lithium Ion Battery Components for Electric Vehicles
  - Financial and Strategy Benchmarking: Investment Bank (Chemicals Div)

Education

- B.Sc (Hons) – Chemistry, University of Newcastle-upon-Tyne, UK

Dr Leonidas Dokos

Dr Leonidas Dokos
Global Programme Manager, Chemicals & Materials in Construction & Utilities

Frost & Sullivan Europe
Oxford, UK

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Functional Expertise

- 12 years of materials and chemicals research expertise, which include 4 years of strategy consulting experience. Particular expertise in:
  - Green Building Materials, Composite Materials, Biolubricants, Cosmetics

Industry Expertise

- Experience base covering broad range of sectors, leveraging long-standing working relationships with leading industry participants' Senior Executives
  - Chemicals & Petrochemicals
  - Infrastructure (Water treatment, Photovoltaic Systems, Wing energy)
  - Construction (Green materials, P&C)
  - Ingredients (Cosmetics)

What I bring to the Team

- Expert research and analytical skills providing strategic input to business growth models
- Forecasting model development
- Competitive environment analysis

Career Highlights

- Extensive expertise in the petrochemical, personal care and cosmetics sectors. Consulting projects for several leading firms:
  - Clariant, Switzerland
  - L'Oreal, France
  - Merck, Germany

Education

- Post Doctorate Diploma in NDET of Materials from University of Southampton, Southampton, UK
- Post Doctorate Diploma in Smart Materials from University of Southampton, Southampton, UK
- PhD in Materials Science from University of Southampton, Southampton, UK
- MSc in Advanced Manufacturing Technologies & Systems Management from U.M.I.S.T., Manchester, UK
- BEng (Hons) in Mechanical Engineering from University of Salford, Manchester, UK

Shomik Majumdar

Shomik Majumdar

Vice President, Chemicals, Materials & Food and Global Programme Manager, Chemicals & Materials in Food, Drugs and Cosmetics

Frost & Sullivan

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Functional Expertise

- Forecasting, ideation, strategy brainstorming, channel/supply chain optimization, competitive benchmarking, technology assessment, technology valuation, pricing, opportunity analyses, mergers and acquisition, and market due diligence
- Voice of customer studies, concept testing, brand positioning tracking and messaging

Industry Expertise

- Chemicals and Materials, Crop Protection, Animal Nutrition, Health & Wellness
- Specialty & Fine Chemicals, Personal Care, Home Care, Packaging, Adhesives and Sealants, Paints & Coatings, Plastics & Polymers, Functional Ingredients, Lubricants and Additives

What I bring to the Team

- Over 12 years of proven consulting expertise (B2B & B2C) in quantitative and qualitative market research methodologies driving business growth strategy and actionability of conclusions. Experience spans both the supplier and client side.
- Defining/applying core competencies of clients with their tactical/strategic marketing needs. Client growth partner champion with regard to opportunities pipeline generation, evaluation and implementation of go-to-market strategies

Career Highlights

- Executed over 75 global strategic consulting engagements for start ups and global companies like DSM, Bunge, Brady Corporation, PolyOne, Evonik, Owens Illinois, Kimberly Clark, 3M, Avery Dennison, LG Chem, Exxon Mobil, DuPont and Dow Chemicals
- Keynote speaker and serve as chemicals track chair at Frost & Sullivan conferences in North America
- Worked for one of the largest retailers in North America with regard to store/private label brand development related to innovation, repositioning and messaging
- Quoted in leading publications like Chemical Week and Chemical Engineering & News

Education

- MS - Chemical/Environmental Engineering, MS – Chemistry (Southern Illinois University, BS – Chemistry, (University of Mumbai)

Sanjiv Bhaskar

Sanjiv Bhaskar
Global Director, Personal Protective Equipment Markets

Frost & Sullivan North America
San Antonio, United States

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Functional Expertise

- Over 11 years of consulting Personal Protective Equipment (PPE), Automation- Building and Industrial and Environmental Industries in:
  - Mergers and Acquisition target research and due diligence
  - Geographical expansion strategy
  - Market entry and expansion strategies
  - New product development and launch strategies
  - Customer based market-competitive strategies, repositioning strategies
  - Innovative distribution concepts

Industry Expertise

- Experience base covering broad range of sectors, leveraging long-standing working relationships with leading industry participants' Senior Executives, Industry Associations
  - Personal Protective Equipment Industry
  - Building Automation Industry
  - Environmental Industry
  - Industrial Automation Industry

What I bring to the Team

- Well recognized as a thought leader in the PPE Industry
- Presented at several National and International Industry forums
- Extensive client interaction and strategic project management
- Oversight of a diverse and global team of analysts and consultants

Career Highlights

- Extensive expertise in Management Consulting, Marketing, and Sales.
- International Work Experience in Emerging Markets and Developed Markets
  - Crystal Frig-O-Rific Systems, Mumbai, India
  - APV Jackstone Ltd, UK, India
  - Associated Capsules Group, India
  - Larsen & Toubro Ltd, India

Regional Teams

The following slides give biographies and contact details for leaders of the regional teams in Frost & Sullivan's Global Chemicals, Materials & Food Practice

Frost & Sullivan is able to support clients on both regionally specific and global projects by leveraging its global network of industry experts

Examples of Frost & Sullivan Chemicals, Materials and Food experts (permanent) by region*

**Examples are not exhaustive, Frost & Sullivan has over 1,600 consultants and analysts globally*

Rajiv Kumar

Rajiv Kumar
Partner and Senior Vice President

Frost & Sullivan
Global
Mountain View, CA

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Functional Expertise

- 20 years of research, strategy consulting, and business management experience including developing and implementing growth strategies across business units. Having worked on 120+ consulting projects, specific expertise includes:
  - Analyzing emerging technologies and markets for commercialization and growth
  - Developing strategies and implementation plans for product development and outsourcing
  - Due diligence of companies, product ideas and new markets to support partnership and M&A activities

Industry Expertise

- Vast experience in covering a broad range of sectors and in leveraging relationships with senior executives at technology start-ups, research institutes, government agencies and Fortune 1000 companies. Prior experience in:
  - Test & Measurement Equipment and Services
  - Automatic Identification including Biometrics, Barcodes, RTLS, Smart Cards, and Security Systems
  - Energy, Environmental and Building Technologies
  - Specialty Chemicals, Performance Materials and F&B Ingredients

What I bring to the Team

- Strategic consulting experience in emerging markets, new technologies and innovation domains across several industries and geographies
- Proven leader in driving multiple global teams to growth and profitability
- Strategic business acumen based on hands-on experience and superior organizational and planning skills

Career Highlights

- Extensive expertise in market research and marketing across several industries and continents:
  - Kennedy Hunter NV, Belgium - Tramping and Port Agency, Real Estate Development Services
  - Apple Industries, New Delhi, India - Software Education Services
  - Bharat Petroleum, Bangalore, India – Oil and Gas Exploration, Production and Distribution
  - Living Media India Ltd., New Delhi, India – Print Media and Advertising Services

Education

- BBS from University of Delhi, India
- MBA from UA, Belgium
- Master of Management Research in Knowledge Management from UniSA, Australia
- PhD. (candidate) in Knowledge Management from UniSA, Australia

Bill Stringer

Bill Stringer
Director

Frost & Sullivan
Europe Israel & Africa
Oxford

Functional Expertise

- 15 years of business consultancy and leadership experience serving global organizations and governments with growth and environmental consultancy. Particular expertise in:
  - Strategic Development
  - Geographic Expansion
  - New Product Introduction
  - Leveraging Low Carbon Economy

Industry Expertise

- Experience base covering broad range of sectors, with a specific focus on
  - Chemicals
  - Materials
  - Food and Beverage
  - Construction

What I bring to the Team

- Leadership
- Challenging Environment
- Strategic Insight
- Environmental Expertise

Career Highlights

- Extensive expertise in business and environmental consulting, in several leading firms:
  - AEA Technology
  - Building Services Research and Information Association
  - CPL Environmental
  - BP

Education

- B Eng (Hons) Chemical Engineering from University of Bath, UK.

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Beatrice Shepherd

Beatrice is a Director at Frost & Sullivan responsible for the Central and East Europe, Russia and other CIS countries. Beatrice is responsible for all consulting and research activities in the region. She typically also acts as project lead, or manager, on a number of engagements that capitalise on her geographical expertise and industry knowledge.

Prior to joining Frost & Sullivan Beatrice worked for Huawei Technologies as the Market Intelligence Manager for Services in Europe, providing a market perspective to senior management to support decision-making, as well as being involved in business planning, strategic decision-making and operational improvement initiatives. She has also worked for Pyramid Research, part of The Economist Group, where she was specifically tasked with coverage of CEE, Russia and CIS. In 2006 she relocated from London to Warsaw to set up Frost & Sullivan operation in the CEE region. In May 2009 she set up Moscow office of Frost & Sullivan.

Some of the latest project she managed:

- Advising to the major Pharma company from the US on strategy in Russia (market entry, M&A, business plan and implementation)
- Designing strategy for major global Pharmaceutical company to introduce oncological drugs to Russia
- Restructuring Russian Pharmaceutical producer and designing new company strategy
- Advising major Swiss company to enter Russia with Healthcare IT offering
- Advising to a major Russian electronic company on strategy, product development and geographical expansion
- Analysing the retail mobile market in South East Europe for the major European vendor
- Undertook a market entry feasibility study for a major Asian service provider which was deciding whether to enter the Russian market with IPTV
- Provided advice to a leading investment bank on the Russian broadcast market

Beatrice has been supervising about 12 projects for Rusnano across different sectors like high-tech, chemicals, automation, electronics, security and others. Beatrice takes active part in number of conferences in Russia and is often quoted in Russian media on the development of the country industries, infrastructure and technologies.

Beatrice Shepherd
Director

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Mani James

Mani James
Program Manager

Frost & Sullivan
Cape Town
Africa

Functional Expertise

- Over 13 years of management and strategy consulting experience, having worked for clients in North America, South East Asia, Asia Pacific and Africa.Particular expertise in:
  - Market assessment and analysis
  - Strategy creation and implementation
  - Market entry and expansion strategies
  - Customer analysis and segmentation
  - Competitive strategy
  - Solutions modeling and implementation

Industry Expertise

- Experience base covering broad range of sectors, working with senior executives to develop and implement strategies across a range of geographies, with particular expertise in:
  - Petrochemicals, Biofuels, materials handling, food additives and chemicals in Africa
  - Industrial Automation and Supply chain management
  - Manufacturing

What I bring to the Team

- In-depth and Wide experience of working across multiple domains in many countries and regions
- Expertise in strategy formulation to develop & implement growth strategies
- Experience in management of consulting projects across multiple sectors and regions
- Facilitation and leadership skills

Career Highlights

- Extensive experience in management and strategy consulting:
  - Mukand Engineers Limited, Mumbai India – Senior Project Engineer & Dragoco / Symrise India Limited – Head – Projects; Ramco Systems Limited , Chennai & Durban South Africa – Senior Consultant
  - Frost & Sullivan, Chennai, San Antonio and Cape Town – Team Leader and Head of CMF

Education

- B.Tech (Mechanical Engineering), National Institute of Technology (NIT), Calicut, India
- Project Management Professional (PMI), USA and PGDCM, XIME, Bangalore, India

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Vishnu Sankaran

Vishnu Sankaran
Industry Manager

Chemicals, Materials & Foods

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Functional Expertise

- Seven years of consulting and strategic market research experience across the spectrum of Chemicals, Materials & Foods, both in regional and selected global markets. Particular expertise in:
  - New business opportunity evaluation in existing and new markets
  - Product diversification and Market entry strategies
  - Partner identification in JV's, Contract Manufacturing, etc

Industry Expertise

- Have executed and overseen consulting engagements spanning some key and fast growing sectors. Have also been a speaker and panelist at prominent summits across Middle East & South Asia, sharing views on specific sectors, namely
  - Petrochemicals & Polymers
  - Specialty & Fine Chemicals
  - Food & Beverages
  - Biofuels

What I bring to the Team

- Varied research and consulting experience across multiple industry segments along with a good understanding of the dynamics of industry players in MENA and emerging regions like India, etc
- Ability to understand client requirements and deliver optimum solutions by managing projects and project teams seamlessly

Career Highlights

- Started as a Research Associate with Frost & Sullivan seven years ago; Currently responsible for building and managing Frost & Sullivan's CMF business across the MENA region
- Planned and spearheaded strategic summits across sectors like fine chemicals, F&B, biofuels and specialty chemicals wherein prominent global experts and Government representatives congregated to share their thoughts and discuss the way forward for growth

Education

- Chemical Engineering from BITS Pilani, India; Masters in Business Administration from American University in Dubai, UAE

Mamta Wadhwa

Mamta Wadhwa
Sr. Director

Chemicals, Materials & Foods

South Asia, Middle East and North Africa

Mumbai, India

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Functional Expertise

- More than 7 years of Marketing and Strategic Consulting experience, advising clients on –
  - Business feasibility aspects
  - Diversification options
  - Market entry and penetration strategies
  - Product/ service development models
  - Business facilitation by way of alliances, M&A activity, and technology collaborations

Industry Expertise

- Experience base covering broad range of sectors and industries including –
  - Commodity, Fine and Specialty Chemicals
  - Petrochemical derivatives
  - Plastics and Performance Materials
  - Paints & Coatings and Additives
  - Food & Beverage and Ingredients
  - Renewable energy platforms

What I bring to the Team

- Efficient leadership and project management skills
- First hand experience in handling complex situation for clients, related to domestic and international business.
- Domain expertise, combined with marketing, technical, and financial consultancy experience
- Driving Practice Growth through Excellent Client Networking and Relationships

Education

- Masters in Management Studies (MMS) in 2001, Bachelor of Pharmacy (B.Pharm) in1998, from Mumbai University

Arden Dai

Arden Dai
(Qiaoling Dai)
Industry Manager

Frost & Sullivan
Shanghai
China

Arden Dai (Qiaoling Dai) is the Industry Manager of CMF (Chemicals, Materials and Food) in Frost & Sullivan Shanghai Office. Previously, Dai has worked in IMS health as a researcher, focusing on ad. hoc research. He was involved in various projects like new product development, consumer study, market opportunity investigation and market strategy development.

At Frost & Sullivan, Dai's work mainly focuses on chemicals, materials and food (CMF). Here, he was involved in the whole process of growth consulting, including research methodology design, market investigation through primary research and desk research, project management analysis and related strategic recommendation. He has successfully worked with many multinational chemical companies, such as Dow, Degussa, Henkel, etc.

He was recently involved in various projects that includes Analysis of the Chinese Green Tea Polyphenols Market, Chinese Textile Market Analysis, Market Opportunity Exploring in Chinese Market for a Leading Packaging Company, Analysis of the Chinese Emulsion Polymer Market Study, Analysis of Chinese Amines and Phosphates Markets, Overview of Chinese Food and Additives Markets, Chinese Feedstock Market Analysis, Chinese Golden Market Analysis, Investigation of the Chinese Thermoplastic Acrylic Resin Market, Chinese Synthetic Latex Market Analysis

Dai graduated as one of the top students in the CHE Dept with a BE in Chemical Engineering. His knowledge and interests remain vastly within the economics and financial sectors.

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Krithika Tyagarajan

Krithika Tyagarajan
Research Director

Frost & Sullivan
APAC
Singapore

Functional Expertise

- 16 years of market research and consulting expertise. Worked on more than 150 significant consulting projects, several on a global scale. Specific expertise in:
  - Market Entry and expansion strategies
  - Competitive intelligence
  - Environment scanning for mergers and acquisitions
  - New applications, customer research

Industry Expertise

- Experience base covering broad range of sectors, leveraging long-standing working relationships with leading industry participants', CEO's and Senior Executives in
  - Chemicals and Materials including paints and coatings, adhesives and sealants, plastics and polymers
  - Functional Food Ingredients
  - Oleochemicals and specialty chemicals

What I bring to the Team

- Ability to quickly understand client needs, scope out proposals and close deals
- Mentor and lead/ develop world class teams with high standards on project management and quality delivery
- High Integrity and Accountability
- Strategic Insights into the chemical industry

Career Highlights

- Extensive expertise as project consultant/ project director in several leading market research and client firms.
  - Project Director and Global Research Executive, Frost and Sullivan,US, Chemicals, Materials and Food practice
  - Strategy and Business Manager, Eastman Chemicals, Singapore
  - Senior Consultant, TNS, Singapore - leading market research firm in Singapore
  - Project Director, Indian Market Research Bureau- leading market research firm in India

Education

- MBA from Indian Institute of Management, Bangalore, India- premier institute in India
- Bachelor of Technology (Btech) in Chemical Engineering, (Distinction) from Osmania University, Hyderabad, India

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Mark Dougan

Mark Dougan
Managing Director

Frost & Sullivan Australia & New Zealand Sydney

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Functional Expertise

- Over 20 years of management and strategy consulting experience, having worked for clients in the UK, Continental Europe, North America, Asia Pacific, Australia and New Zealand. Particular expertise in:
  - Market assessment and analysis
  - Market entry and expansion strategies
  - Customer analysis and segmentation
  - Competitive strategy
  - Mergers, acquisitions and joint ventures

Industry Expertise

- Experience base covering broad range of sectors, working with senior executives to develop and implement strategies across a range of geographies, with particular expertise in:
  - Renewable energy (wind, solar)
  - Biofuels
  - Process control
  - Telecommunications

What I bring to the Team

- Wide experience of working across multiple countries and regions
- Expertise in facilitating management teams to develop and implement growth strategies
- Experience in management of consulting projects across multiple sectors and regions
- Facilitation and moderation skills

Career Highlights

- Extensive experience in management and strategy consulting:
  - PA Consulting Group, London, UK and Sydney, Australia – Principal Consultant
  - Cap Gemini Ernst & Young, Sydney Australia – Senior Manager
  - Arthur D. Little, Singapore – Senior Manager

Education

- MA (Hons) History, University of Cambridge, UK
- Diploma in Marketing, Peterborough Regional College, UK

Ivan Fernandez

Ivan Fernandez
Industry Director, Industry & Chemicals Practice

Frost & Sullivan Australia & New Zealand Sydney

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Functional Expertise

- Over a decade of consulting experience, which includes particular expertise in:
  - Market assessment
  - Growth strategy development
  - Competitor analysis
  - Technology roadmaps
  - Customer / End-user insight
  - Thought-leadership

Industry Expertise

- Experience base covering a broad range of sectors, leveraging long-standing working relationships with leading industry participants' Senior Executives, including focus on:
  - Food & Beverage (health & wellness ingredients, consumer trends)
  - Energy (biofuels, renewables)
  - Automation & Process Control (pumps, gears, automation software)

What I bring to the Team

- Strong research and analysis skills
- Ability to work across diverse sectors
- Detailed, clear and comprehensive report writing and presentation
- Strategic project management

Career Highlights

- Working directly with major companies, industry associations and government agencies including:
  - Schneider Electric
  - Siemens
  - Eaton Electric
  - Grundfos
  - Mono Pumps
  - Wartsila
  - Rockwell Automation
  - Toshiba
  - Gallagher Group
  - Dairy Australia
  - Fonterra
  - Austrade
  - Industrial Research Ltd
  - Kimberly-Clark
  - United Group Limited

Education

- MBA from Loyola College, (Chennai, India)
- MA, Mass Communication from Madurai Kamaraj University, (Chennai, India)
- Bachelor of Science, Visual Communication from Loyola College, (Chennai, India)

Alessandra Lancellotti

Alessandra Lancellotti

Research Team Leader
Chemicals, Materials & Foods

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Latin America
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Functional Expertise

- Chemical market expertise, which include:
  - Emerging trends and market dynamics analysis and monitoring
  - Pricing Policy for surfactants and oleochemicals products
  - Depth knowledge of the chemical industry value chain

Industry Expertise

- Seven years in the chemical and petrochemical sector, with focus on marketing strategies, including:
  - Cost and margin impact analysis
  - Supply / demand balance for specialty chemicals
  - New product line marketing plan
  - Go-to-market strategies and decision support models to new business development

What I bring to the Team

- Technical expertise and understanding of the chemical and petrochemical sector
- Efficient and skilled analysis
- Industry contacts and connections, understanding market trends from the participant's point of view

Career Highlights

- Marketing expertise in leading petrochemical companies:
  - Oxiteno, Sao Paulo, Brazil
  - Eastman Chemical, São Paulo, Brazil
  - International experience in France, working on R&D for effluents treatment

Education

- MBA in Administration from Fundação Getúlio Vargas, São Paulo, Brazil (in course)
- Chemical Engineering from Universidade de São Paulo, São Paulo, Brazil

Next Steps

- Contact one of the regional representatives in this presentation to request a proposal for our Growth Partnership Services or Growth Consulting Services to support you and your team in accelerating the growth of your company.

- Attend one of the Chemicals, Materials and Food Team's complimentary **Analyst Briefings**.
  - For the latest listing **click here**.

- Sign up for our complimentary **Growth Opportunity Newsletters** and keep abreast of innovative growth opportunities
  - **Click here** to subscribe to the Chemicals & Materials Newsletter
  - **Click here** to subscribe to the Food & Beverage Ingredients Newsletter

- Find out more about our programme areas by clicking on the following links:
  - **Food & Beverage Ingredients**
  - **Chemicals & Materials in Transportation**
  - **Chemicals & Materials in Construction & Utilities**
  - **Chemicals & Materials in Food, Drugs & Cosmetics**
  - **Personal Protective Equipment**