

# 2nd Rosefield Conference on Circular Economy in Used Oil

## Conference Synopsis

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2023  
May





Valvoline™ presents

# 2nd Rosefield Conference on Circular Economy In Used Oil

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Organised by  ROSEFIELD ENERGY TECH

in association with



 May 11, 2023 09:00AM - 6:00PM

 Nesco, Mumbai

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# EXECUTIVE SUMMARY

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India is currently the world's third-largest lubricant market and has developed an efficient ecosystem involving refineries, blenders, and additive manufacturers. The lubricant sector's primary segments, automotive and industrial, are expected to experience growth in volume and sales in the coming decade, as most economists predict a high growth rate for India. The total Indian lubricant demand currently stands at 2.8 million Tonnes, projected to reach almost 4 million Tonnes by 2030. Therefore, India must have a proper strategy for the disposal of used lubricants.

The disposal of used lubricants is a major environmental problem. India lacks a formal and organised system for collecting and recycling used oil. Most of the used oil collection is done by the informal sector, which consists of scrap dealers, intermediaries and small-scale operators who buy used oil from various generators, such as workshops and factories. According to Rosefield's research, only about 15% of used oil is collected for re-refining in India, while the rest are either burned or dumped illegally.

In light of the recently launched EPR gazette notification for Used Oil, the '2nd Rosefield Conference on Circular Economy in Used Oil' was proven crucial for all major stakeholders, such as lubricant manufacturing companies, Auto OEMs, Industries, re-refiners and government agencies to come together to share their views and opinions about it. The conference served as a valuable platform for stakeholders to exchange ideas and knowledge to tackle various challenges such as collection, reverse logistics, and re-refining technology & will be pivotal in reaching a consensus regarding upcoming regulations.

In summary, the 2nd Rosefield Conference on Circular Economy in Used Oil successfully provided an impetus to the idea of a Circular Economy, uniting key players to tackle various challenges while highlighting the immense potential in oil re-refining.



# CONFERENCE AGENDA

- 09.00-10.00 Registration
- 10.00-10.10 Welcome and Safety Briefing
- 10.10-10.25 Inauguration of Conference
- 10.25-10.40 Setting the Context



**SHAIENDRA GOKHALE**  
*Director*  
*Rosefield Energy Tech*

- 10.40-11.20 Inaugural Session: Partnering for Sustainable and Greener Future

Takeaway: Overall build a case for adoption of CE in Used Oil and call upon stakeholders for joint action.



**KARTIKEYA SARABHAI**  
*Founder,*  
*CEE*



**SURESH LONDHE**  
*Joint Director of Industries,*  
*Government of Maharashtra*



**HEM PANDE**  
*Former Secretary,*  
*Ministry of Environment*



**R RAMAKRISHNAN**  
*Global Head - Customer Care,*  
*TMCV*

- 11-20-11.45 Tea Break

# CONFERENCE AGENDA

11.45 – 12.45

## Session 1: Perspectives of Oil Companies on Circular Economy in Used Oil

Takeaway: Increase industry awareness of the benefits of transitioning from a Linear to a Circular Economy to tackle environmental challenges and promote economic recovery.



**SANJAY KUMAR**  
ED - Lubes SBU  
HPCL



**SANDEEP KALIA**  
Managing Director  
Valvoline Cummins Pvt Ltd



**SYED SHAKILUR RAHMAN**  
CEO - Lubricants & ED  
TotalEnergies



**SUNIT MUKHERJI**  
Head Lubricant Supply Chain  
& Operations  
Shell



**KAPIL VYAS (MODERATOR)**  
Director  
Standard Greases and  
Specialities

12.45 – 13.30

## Session 2: Challenges and Solutions for Auto OEMs in adopting Lubes formulated with RRBOs & Involving channel partners for safe disposal

Takeaway: Discuss the role of Auto OEMs in driving CE initiatives in Used oil and their expectations from other stakeholders in meeting finished lube specifications.



**R RAMAKRISHNAN**  
Global Head- Customer Care  
Tata Motors CV



**SUKHDEEP SINGH KOCHAR**  
Head of customer relations &  
spare parts  
M&M - Tractor Divisions



**GAUTAM MEHRA (MODERATOR)**  
Chairman & MD  
Savita Oil Technologies

# CONFERENCE AGENDA

13.30 – 14.30

Lunch Break

14.30 - 15.30

**Session 3: Trends in re-refining technology & Challenges and Solutions in Reverse Logistics & Collection - Best Practices**

Takeaway:

Understand about the global technology available for re-refining used oil and getting acceptance from OEMs and Lube manufacturers in their formulations.

Deep dive into the challenges of building the ecosystem for Used Oil recovery and the reverse logistics value chain, including used oil pricing and the necessity of a fair pricing mechanism.



**MARC VERFÜRTH**  
CEO  
Avista Oil (Germany)



**FABIO DALLA GIOVANNA**  
Business Development Director  
Technoology (Italy)



**SAHIL BHARGAVA (MODERATOR)**  
Head of Strategy  
IFP Petro Products

15.30 - 15.45

**Session 4: Challenges of integrating informal sectors- Experiences of CEE**

Takeaway:

CEE partnering with state governments, foundations & corporates, undertakes projects related to rural and urban development, Waste management, education and biodiversity conservation.



**PRABHJOT SODHI**  
Sr. Director (Circular Economy)  
CEE



**BRIGADIER A K SINGH**  
Indian Army



# CONFERENCE AGENDA

15.45 – 16.15

Tea Break

16.15 – 17.30

**Session 5: Way Forward – Addressing critical gaps in Reverse Logistics, Technology, Financing – Roles & Responsibilities of Stakeholders**

**Takeaway:**

Emphasize the importance of the Circular Economy as the way forward and encourage industry participants to take on the roles of Circular Economy champions to ensure environmentally sustainable economic growth in India.



**RAJESH NAMBIAR**  
*Chief General Manager*  
IOCL



**PRASHANT BANERJEE**  
*Executive Director*  
SIAM



**SANJAY AWASTHI**  
*Sr Vice President Supply Chain*  
Valvoline Cummins Pvt Ltd



**SUDHIR KUMAR**  
*Former Adviser (Industry)*  
Niti Aayog



**ANANT BHARGAVA**  
*CEO*  
IFP Petro Products



**MAYANK PANDEY**  
*Wholetime Director*  
Castrol

17.30 – 18.00

**Closing Notes & Vote of Thanks**



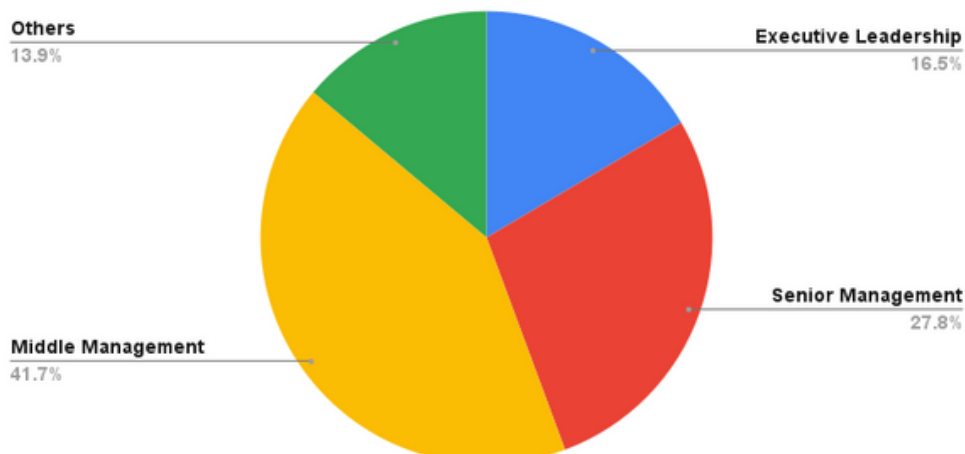
**KASTURI BHAVE**  
*Co-founder & CFO*  
Rosefield Energy Tech

# AUDIENCE DEMOGRAPHICS

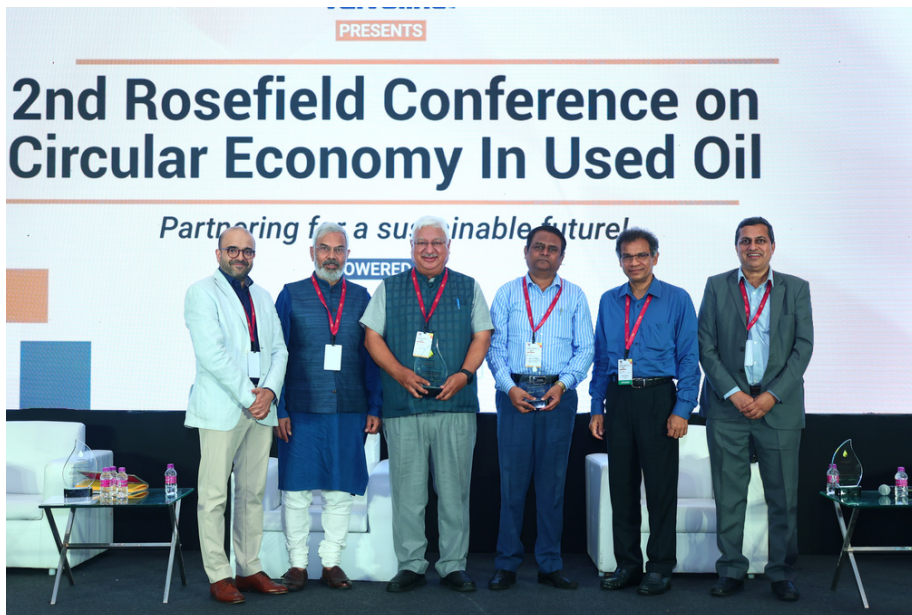
## Delegates from few participating Companies



## Breakdown of Attendees by Seniority



# INAUGURAL SESSION



The conference's inaugural session focused on the concept of Circular Economy (CE) in the context of Used Oil. Esteemed speakers highlighted the economic benefits, job creation potential, policy formulation and a need for sustainable growth through CE. They emphasized the importance of bridging the gap between formal and informal sectors, incentivizing collection and reverse logistics, and shifting the focus from shareholders to stakeholders.

- Padma Shri Dr Kartikeya Sarabhai, Founder of CEE, highlighted the economic significance of a Circular Economy (CE) and its potential in job creation.
- Mr Ramkrishnan, Global Head of Customer Care at TATA Motors, shared the company's commitment to achieving net-zero carbon emissions by 2045, aligning with the government's target of 2070.
- Mr Suresh Londhe, Jt. Director of Industries for the Govt of Maharashtra, discussed the government's comprehensive CE policy and the importance of stakeholder input, aiming for a 10% push in GDP through CE and promoting startups in this sector.
- Mr Hem Pande, Former Secretary of the MoEFCC, acknowledged the existence of sound policies but pointed out execution gaps, calling for a shift in focus from shareholders to stakeholders for sustainable and inclusive growth.



# SESSION ONE



Session one brought prominent leaders from the lubricant industry together to discuss their views and opinions about the latest EPR gazette notification about Used Oil. Lubricant companies have expressed their recognition of the ambitious 10% target of Extended Producer Responsibility (EPR) while acknowledging the importance of evaluating the industry's preparedness and the current situation in the re-refining sector.

- Mr Sandeep Kalia, MD of Valvoline Cummins spoke about the benefits of using re-refined base oil (RRBO), a practice that has been followed since 2010. He emphasized the quality standards of RRBOs and the crucial role of government and OEMs in adopting re-refined lubricants. He also briefly discussed consumer educational programs and net carbon zero targets of Valvoline.
- Mr Sanjay Kumar, ED of HPCL mentioned India's history with RRBO. Mr Kumar underscored the importance of obtaining high-quality RRBOs and called for unity among competitors to overcome challenges in reverse logistics, diversion into alternate end-uses and refining technology.
- Mr Shakulr Rehman, CEO of TotalEnergies highlighted the importance of Group-II quality RRBO. He also discussed the feasibility of importing RRBO to meet the requirement.
- Mr Sunit Mukherjee, VP Supply Chain of Shell Lubricants reiterated the need for collective efforts from the industry for an efficient used oil collection system.
- Mr Kapil Vyas, Director at Standard Greases & Specialities urged integrating the unorganized sector of Used Oil collectors into the formal economy, emphasizing the importance of not wasting any Used Oil.

# SESSION ONE

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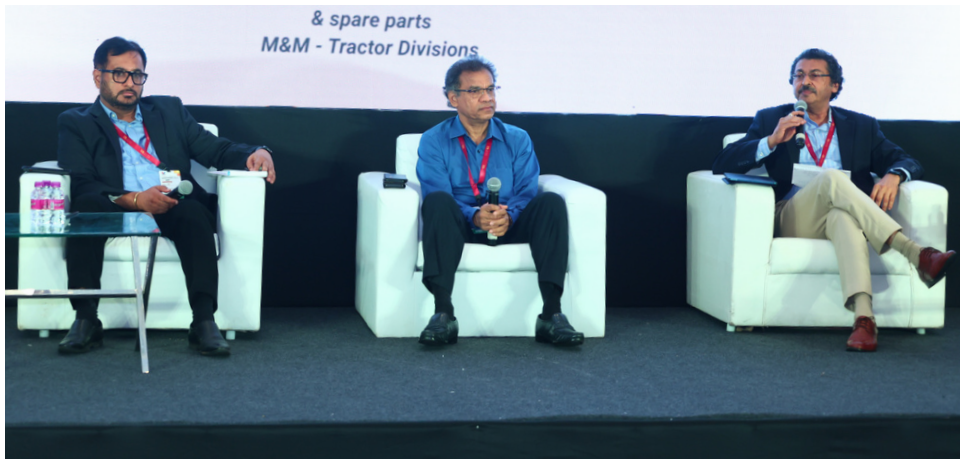


## Key Points

- There is a need for standards and regulations for RRBO. Government support is needed to build and re-define the sector's infrastructure.
- Public awareness about Used Oil management is critical for the success of CE.
- Public and private lubricant companies, Auto OEMs, and Government agencies need strong collaboration and coordination to help this transition.
- The 10% recycling target mentioned in the EPR gazette notification is ambitious to achieve, considering industry preparedness.
- Reverse logistics infrastructure is crucial to transforming from a linear to a circular economy.
- There is a need for modern technologies which can produce Group II RRBO from the industry.

# SESSION TWO

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Session two was essential to understand the role of Auto OEMs in driving CE initiatives in Used oil and their expectations from other stakeholders in meeting finished lube specifications. The panelists raised concern about the possibility of RRBO demanding higher prices than Virgin Base Oil due to the supply-demand gap and perception of a recycled product among consumers. They also recognised reverse logistics as a critical hindrance in the circular economy.

- Mr Ramakrishnan exuded confidence that being the largest generator of Used Oil in the country, TATA Motors will be able to mandate their franchised workshops collect, record and supply Used Oil back to the authorized agencies through the same logistics channel that supplies Fresh Oil. He however emphasized that collection through informal sectors will be a challenge.
- Mr Sukhdeep Kochar of Mahindra stressed on the economic benefits to end consumers and to position the RRBO based Lubes as another option for consumers to buy
- Mr Gautam Mehra, MD at Savita Oil Technologies, identified the absence of standards and regulations in RRBO as a significant concern. He also mentioned the need for modern technologies like hydro-treating to make Group II Base Oil from Used Oil, which requires substantial capital investment & suggesting government support to bolster the re-refining.



# SESSION TWO

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## Key Points

- Commitment from Auto OEMs is a key to EPR implementation as they can ensure the initial impetus to this movement by providing consistent and quality supplies of Used Oil through their franchise workshop channels
- Some Auto OEMs have taken the lead and are ready with approved formulations using RRBO, while others are yet to join the bandwagon
- There is a need for standards and regulations for RRBO products.
- Due to the supply-demand gap, there is the possibility of RRBO getting more expensive than Virgin Base Oil
- Consumers may not be willing to pay more for a 'recycled' lubricant

# SESSION THREE



Session three took a solution-oriented approach to various challenges in CE. This session provided a brief idea to the audience about how countries which are global champions (Italy, Germany) in re-refining overcame the challenges of reverse logistics, Used Oil pricing and technology.

- Marc from Avista Oil shared insights on cost-efficient solvent extraction technology. He also highlighted the advantages of digital technology incorporated in the CE sector.
- Fabio from Technoility highlighted the success of hydrogenation technology in oil refining.
- Fabio discussed in detail the working and role of the 'consortium of waste oil' in Italy. He believes the same model can be exported to other countries to improve waste oil collection, segregation and re-refining.
- The lubricating oil manufacturers in Italy, totalling over 400, must actively engage in the consortium (CONOU) by making annual financial contributions. These contributions cover the collection costs and provide incentive fees to re-refining plants for treatment, in alignment with the EPR scheme.
- Sahil Bhargava from IFP Petro discussed the interdependence of collection, technology, and supply and demand, comparing it to the chicken and egg problem.

# SESSION THREE

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## Key Points

- Bringing and implementing best practices regarding collection, reverse logistics and technologies can help to speed up the transformation
- Collaboration with global re-refiners can assist the Indian re-refining sector with challenges regarding technology.
- India can draw inspiration from Italy's consortium model to improve its re-refining sector.
- Digitizing the waste collection can bring efficiency and transparency to the supply chain.

# SESSION FOUR

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Session four focused on integrating and uplifting unorganised informal sectors in the waste collection segment. As the informal sector primarily carries out India's current used oil collection, the session gave the audience invaluable insights and case study outcomes. Brigadier A K Singh complimented the session with his unique experiences with waste management.

- Mr Sodhi from CEE, in his session, underscored the importance of bridging the gap between formal and informal sectors in waste management.
- A call was made for systematic integration focusing on livelihoods, inclusivity, and networking with large-scale waste generators.
- Brigadier A K Singh shared his experience with scientific waste management in a military station in Amritsar.
- He shared the process of composting organic waste using microbes, which involved a lot of trial and error despite expert involvement due to a lack of practical experience.



# SESSION FIVE



Session five focused on the importance of CE as the way forward and encouraged industry participants to take on the roles of CE champions to ensure environmentally sustainable economic growth in India.

- Mr Nambiar from IOCL highlighted IOCL's notable work in the sector and presented his views on the upcoming EPR
- Mr Sanjay Awasthi from Valvoline Cummins and Mr Mayank Pandey from Castrol discussed challenges in fully utilizing the existing re-refining capacity. They also examined the practicality of lubricant manufacturers acting as collection agencies.
- Mr Prashant Banerjee from the Society of Indian Automobile Manufacturers (SIAM), emphasized the importance of circularity in the automotive industry.
- Mr Sudhir Kumar from NITI Aayog, a key figure in implementing EPR for Used Oil, clarified the intricacies of EPR to the attendees.
- Mr Anant Bhargava, CEO of IFP Petro, investigated the feasibility gap of reverse logistics and proposed ways to enhance collection procedures.
- The conference's partnership announcement between IFP Petro Products and Avista Oil gave a promising glimpse into future collaborations and advancements in this field.

# SESSION FIVE

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## Key Points

- There is significant underutilized re-refining capacity in India.
- There are many Indian re-refineries which produce inconsistent quality of RRBO that don't match the current specification requirement.
- Bringing in the informal sector of the Automotive industry is an essential step in the success of Used Oil's Circular Economy.
- All Used Oil generators need to know their role and responsibilities in Used Oil disposal.

# ACKNOWLEDGEMENT

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We would like to express our heartfelt gratitude to all the sponsors, the organizing team, the Centre for Energy and Environment (CEE), and the co-organizer Hindustan Petroleum Corporation Limited (HPCL) for their invaluable support in making the event a resounding success.

We extend our sincerest appreciation to all the participants for their active involvement and contributions, which enriched the discussions and fostered a collaborative atmosphere. Your dedication and enthusiasm have played a pivotal role in creating a meaningful and impactful event. Thank you all for your unwavering support and participation.

## ROSEFIELD ENERGY TECH (RET)

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### KNOWLEDGE AND MANAGEMENT CONSULTING

Rosefield Energy Tech (RET) was founded to bring all stakeholders from the energy sector together. RET is an independent consulting firm providing strategic, financial and technical advisory services related to Lubricant and EV domains, focusing on ESG and Circular Economy.

Rosefield Energy Tech plays a pivotal role in the Circular Economy in Used Oil by leveraging its strong network and expertise in the industry.



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