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AGENDA

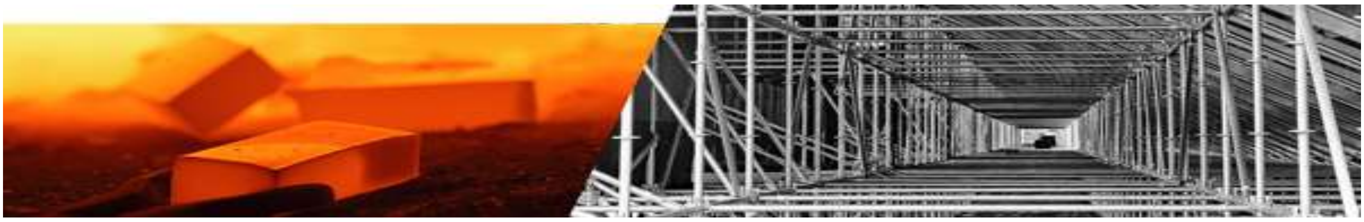
13th Annual

STEEL MARKETS EUROPE CONFERENCE

Profiting from a changing landscape for European steel

Plus post-conference HEDGING & PRICE RISK MANAGEMENT WORKSHOP

June 19 – 20, 2017 (Workshop – 20 June) | NH Hesperia Tower Hotel | Barcelona, Spain



Platts is delighted to reveal that the 13th edition of Steel Markets Europe returns to Barcelona on June 19 – 20, 2017 at the NH Hesperia Tower Hotel.

As this event is designed for Europe's leading **producers, traders, service centers, raw material providers** and **end users** today, Platts has sourced nearly **30 expert speakers** to gather for frank discussion and unrivalled debate. This will include how *European producers can profit from a changing landscape for European steel.*

And for the second time at the conference we will also have a must attend **half day post-conference workshop** on **June 20** on **hedging and price risk management.**

WHY ATTEND?

- **The big picture – Setting the scene – Part one** - Latest macroeconomic developments, demand and growth, and global price movements – what does it all mean for the steel industry?
- **Trade wars: Investigating the latest for Europe, the US and China** – Examining the displacement of China through anti-dumping legislation and tariffs in Europe and the US
- **Raw materials, trading and steel pricing** – Dissecting the latest trends, challenges and opportunities
- **Investigating M&A trends & implications on overcapacity** – Outlining the latest merger and acquisitions, and financial performances of steel producers by region
- **Latest developments, challenges and new market opportunities** – Shedding light on North African, Turkish and Middle East markets
- **Future signs of growth in end user markets** – What are we seeing in the automotive, construction, energy and consumer goods sectors?
- **The age of digitization**: What does Industry 4.0 mean for the steel industry?
- **The big picture – Setting the scene – Part two** – Liberty's position and growth in the UK market, how dynamic a smaller business can be with British Steel, the Emissions Trading Scheme's impact on steel, and latest state of play for specialized steel and products – what best practice examples are we seeing?

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METALS

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DAY 1 – Monday 19th JUNE 2017

08:00 Registration and continental breakfast

08:55 Chairman's welcoming remarks

Christopher Davis, Content Director, EMEA Metals, **S&P Global Platts**

THE BIG PICTURE – SETTING THE SCENE – PART ONE

09:00 Latest macroeconomic developments, demand and growth, and what it all means for the steel industry

- State of play for demand and growth in 2017 and beyond
- Brexit and single market implications – how much will it all matter for UK steel demand in future?
- Exploring what impact the first few months of a Trump presidency has had on US steel and on the industry globally, and what is being done to achieve a renaissance there long term?

Jeroen Vermeij, Director for Market Analysis and Economic Studies, **Eurofer**

09:25 Global price movements: Will price increases continue and what are the drivers?

- Are current high prices sustainable?

Peter Brennan, Senior Editor, **S&P Global Platts**

LEADER PERSPECTIVES – TRADE WARS: INVESTIGATING THE LATEST FOR EUROPE, US AND CHINA

Protectionism or defence?: Examining the latest on the displacement of China through anti-dumping legislation and tariffs in Europe and the US

- Latest EU trade actions, impact on steel prices and prospects of China retaliation
- What else has been going on in the US and other markets?
- Examining claims of Chinese steel being exported via Vietnam to avoid tariffs in western markets
- To what extent are Chinese materials being replaced by local mills or other import options from markets such as India, Japan, Vietnam, Brazil, Turkey, South Korea, Egypt and Russia?
- Monitoring China's legal challenge against the EU and US over their reluctance to treat it as a 'market economy' under WTO rules
- Latest on how the domestic Chinese market is performing and efforts to address overcapacity and output
- Side effects of anti-dumping on end user production costs and competitiveness
- Does protectionism mean less of a premium for efficiency? What are the long term implications of this?

09:50 The European Commission perspective

Francisco Perez Canado, Head of Unit of Market Access, Industry, Energy and Raw Materials Unit, **European Commission**

10:10 The European producer perspective

Dr. Henrik Adam, Chief Commercial Officer, **Tata Steel Europe**

10:30 The US perspective

Timothy J. Gill, Chief Economist**, American Iron and Steel Institute**

10:50 Networking and refreshment break

11:30 The trader perspective

Dick Sands, Director, **Stemcor**

11:50 The lawyer perspective

Yuriy Rudyuk, Partner, **Van Bael & Bellis**

12:10 The association perspective

Simone Jordan, Chairwoman, **ISTA** and Steel Trader, **Ronly**

12:30 Group Q&A

Presenters from the proceeding session will take questions from the Chair

13:00 Networking lunch

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RAW MATERIALS, TRADING AND STEEL PRICING

14:20 Steel price risk management – how LME products can help your business

- Overview of new steel risk management products
- Performance of the products since the 2015 launch
- Benefits of hedging – how to protect your margins

Marko Kusigerski, Head of Ferrous, **London Metal Exchange**

14:45 PANEL
Dissecting the latest on raw materials, trading and steel pricing – trends, challenges and opportunities

- Exploring the latest on coke, coal, iron ore and scrap prices by region and their causes
- Investigating the ferrous scrap market globally
- Examining the latest trade routes and developments and opportunities for traders

Francis MacKenzie, President, **North Atlantic Iron Corp.**
Andrey Shevchenko, Senior Analyst, **Interpipe**
Mario Borsese, Director Commercial, **DP Trade**
Tommaso Sandrini, President, **San Polo Lamiere and Assofermet Acciai**

Moderated by:

Colin Richardson, Editor-in-Chief, **Steel Markets Daily, S&P Global Platts**

15:30 Networking and refreshment break

LATEST M&A TRENDS AND IMPLICATIONS ON OVERCAPACITY

16:00 Outlining the latest mergers and acquisitions trends, and financial performances of steel producers by region

- What impact are M&As having on overcapacity, especially China?

Alessandro Abate, Head of Global Steel & Mining Equity Research, **Berenberg**

MARKET DEVELOPMENTS, CHALLENGES AND OPPORTUNITIES

16:25 Prospects of steel consumption in Russia

Igor Sapozhnikov, Chief Steel Markets Analyst, **Magnitogorsk Iron & Steel Works**

16:50 PANEL
Latest developments, challenges and new market opportunities – shedding light on North African, Moroccan and Turkish markets

- Exploring how and why the Turkish market is gaining importance
- Examining Western/Southern Europe, and Central and Eastern Europe

Rafik Namir, Marketing & Intelligence, Business Steering, **Maghreb Steel**
Igal Zakuto, Deputy CEO, **ArcelorMittal RZK Celik Servis Merkezi**
Ersun Ozdemirel, Export Manager, **Borcelik Celik Sanayii A.S.**
Jose Angel Rey, Commercial Director, **CELSA**
Laurent Plasman, Head of Operational Marketing, Central CMO Team of Flat Products Europe, **ArcelorMittal**

Moderated by:

Vaseem Karbhari, TSI Regional Manager, EMEA, **S&P Global Platts**

17:35 Chairman's concluding remarks

Christopher Davis, Content Director, EMEA Metals, **S&P Global Platts**

17:45 Networking reception – join us for drinks
Join us immediately after the close of day one for drinks in the Dome bar. Nurture or forge those relationships you will need for the years ahead.

DAY 2 - TUESDAY 20 JUNE 2017

08:55 Registration and continental breakfast – sponsorship available

09:25 Chairman's welcoming remarks

Peter Brennan, Senior Editor, **S&P Global Platts**

THE BIG PICTURE – SETTING THE SCENE – PART TWO

09:30 KEYNOTE Liberty's position and growth in the UK market

- Examining its business model and asset growth in the UK, US and Australia
- Prospects of low power costs to power 'green steel' in the UK
- Why will Liberty succeed in the future?

Virinder B. Garg, CEO, **Liberty Steel Newport**

09:55 The CO2 regime: The EU Emissions Trading System and its impact on steel makers

- The reform of the EU Emissions System (ETS): status quo of the ongoing legislative procedure
- The ETS and steel makers: chances and challenges ("carbon leakage")
- The Paris Agreement: perspectives for fair competition in the global steel market?

Dr. Götz Reichert, Head of the Environment, Energy, Climate and Transport Division, **CEP Centre for European Policy**

10:20 Latest state of play for specialized steel and products – what best practice examples are we seeing?

- As more producers move into high-value products, to what extent will price pressures intensify?
- What are the challenges in moving towards a high end specialized steel model?

Laurent Plasman, Head of Operational Marketing, Central CMO Team of Flat Products Europe, **ArcelorMittal**

10:45 Networking and refreshment break

EXAMINING FUTURE SIGNS OF GROWTH IN END USER MARKETS

11:15 End user demand: What are we seeing in the automotive, construction, energy and consumer goods sectors?

- Exploring increased costs for the automotive industry – what new product developments are we seeing?
- To what extent will auto be a driving factor for demand
- Is there limited projects in the pipe industry?
- What steel uses related with energy efficiency and durability are we seeing?
- Examining refining and petrochemical demand for steel

Jose Angel Rey, Commercial Director, **CELSA**

STEEL MILL MARGINS & RAW MATERIALS

11:40 Volatility is the new norm – a look at steel mill margins and raw materials

Alina Wills, Managing Senior Analyst, MVS, **S&P Global Platts**

STEEL DISTRIBUTION AND SERVICE CENTRE LANDSCAPE

12:05 Distribution: Outlining the evolving landscape across Europe

- Outlining the evolving landscape and business models across Europe
- Regional vs. European business
- Ownership by mills vs. independency
- What is the contribution in the value creation chain?
- What are differences globally?

Dr. Jens Lauber, Managing Director Distribution Europe, **Tata Steel** and President, **EUROMETAL**

LOOKING BACK AND EXPLORING THE FUTURE

12:30 What are we likely to see in future? Let's discuss along with key takeaways from the conference…

Peter Brennan, Senior Editor, **S&P Global Platts**

12:40 Close of conference

HEDGING & PRICE RISK MANAGEMENT WORKSHOP*

TUESDAY, JUNE 20, 2017

13:00 Registration and refreshments – sponsorship available

13:30 Introductions: Workshop Leaders and Participants

Preston Gibson, Head of Global Training, **S&P Global Platts**

13:45 The role of exchanges

Marko Kusigerski, Head of Ferrous, **London Metal Exchange**

14:00 Incentives & risks for hedging
Phillip Price, CEO, **Ferrometrics**

14:45 Networking refreshment break – sponsorship available

15:00 The role of indexes & available future contracts

Stefan Swanepoel, European Steel Analyst, **The Steel Index**

15:45 Hedging examples by supply chain segments

- Mills for raw material inputs and selling finished products
- Stockists for inventory management and fixed sale pricing
- Manufacturers for steel buying

16:45 Workshop ends

*** Half day post-conference workshop on hedging and price risk management – special discounted rates are available for those who book onto both events.**