The world’s largest gathering of stainless & special steel industry leaders

10th International Stainless & Special Steel Summit
7-9 September 2011
Sofitel, Munich Bayerpost, Munich, Germany

Hear from key industry-leading speakers:
- Pascal Payet-Gaspard, International Stainless Steel Forum, Belgium
- Kari Parvento, Outokumpu Oyj, Finland
- Julien Onillon, Aperam, France
- Philip Yang, POSCO Europe Office, South Korea
- Peter Van Hüllen, Georgsmarienhütte Holding GmbH, Germany
- Benedikt Niemeyer, Schmolz-Bickenbach, Germany
- Martin Löwendick, Schmolz-Bickenbach, Germany
- Marc Thümecke, UniCredit Bank AG, Germany
- Benno Kratz, ELG Haniel Trading GmbH, Germany
- Carl Landuydt, Aperam, Luxemburg
- Oliver Zipper, BGH Edelstahlwerke GmbH, Germany
- Mark Midgely, ENRC Marketing AG, Switzerland
- Wolfgang Emmerich, Böhler Uddeholm AG, Austria
- Wolfgang Kübbisch, Böhler Edelstahl GmbH & Co KG, Austria
- Thorsten Studemund, Voß Edelstahlhandel GmbH & Co KG, Germany
- Dennis Oates, Universal Stainless and Alloy Products, USA
- Sunil Widge, Carpenter Technology Corporation, USA
- Joachim von Schéele, BOC India – A Member of the Linde Group, India
- Thomas Pauly, Euro-Inox, Belgium
- Jens Uhlen, Technoform Glass Insulation GmbH, Germany
- Harald Holzgruber, Intec Special Melting Technologies GmbH, Austria
- Siegfried Pfeßlinger-Schweiger, Poligrat GmbH, Germany
- Neeraj R. Kochhar, Viraj Profiles Ltd., India

“Networking: Very good representation of producers, distributors & end-users.”
Ugitech, France

For more information and to register please visit www.metalbulletin.com/events/iss
Metal Bulletin Events’ and SMR would like to invite you to attend the world’s largest stainless & special steel industry gathering: 10th International Stainless & Special Steel Summit.

The stainless and special steel industry made a tremendous re-bound in 2010. Demand grew by around 20% for stainless and engineering steels and 40% for tool steels. Sounds good, but how can the industry turn this into sustainable profits?

Investors see the specialty steel industry increasingly as a high-risk, uncertain-return industry, where the valuation of companies is below average.

The biggest challenge for the stainless and special steel industry is how to regain control over margins and profits.

The summit in Munich will be a platform to discuss the options available for this dynamic industry to get back in the driver seat of its fate. All within anti-trust rules off course.

The motto: ‘Let’s talk about money – from volume to value’ shall be the stainless steel industry’s ‘magnetic north pole’ in order to find direction again to sustainable profitability.

Any serious player in stainless & special steel cannot afford to miss out.

“Good participation from all sides, producers, stockholders and end users.”

Schmolz + Bickenbach, Germany

“The most interesting event of today. Well done.”

Nichel Leghe Spa-Croninet Group, Italy

Over 300 delegates attended in 2010

Just a few of the companies who attended in 2010

- Acerinox
- Ambica Steels Limited
- ArcelorMittal Stainless Europe
- Boelimgaus GmbH + Co KG
- Cogne Acciai Speciali Spa
- Credit Agricole CIB
- Cronimet Ferroleg GmbH
- Cunico Resources
- Dacapo Stainless
- Damstahl GmbH
- Deutsche Bank
- Ecor Research spa
- ELG Haniel Group
- Emirates Lead Company FZC
- ENRC Marketing AG
- Eramet
- Eti Krom Inc
- Gerdau Sideror
- Global Stainless Steel
- Harso Metals
- Hitachi Metals Europe GmbH
- Inox AS
- JSL Stainless Ltd
- Kominex International AB
- Macquarie Capital Securities
- Marcegaglia SpA
- Mechem
- Metalcom SpA
- Norilsk Nickel
- Nova Trading SA
- Orinox
- Outokumpu
- Posco
- Posri
- Rautaruukki
- ReOrbis
- Rodacciai SpA
- Salgitter Mannesmann International GmbH
- Samsung Deutschland GmbH
- Sandvik Materials Technology
- Sassoli Group
- SBI Capital Markets
- Shanghai Steelhome Information Technology Co Ltd
- Sheffield Forgemasters International Limited
- Siemens VAI Metals Technologies GmbH & Co
- Sinosteel Germany GmbH
- Syndex
- Tenova I2S
- ThyssenKrupp Acciai Speciali Terri SpA
- TMK
- Treibacher Industrie AG
- Tubacex
- Ugitech SA
- UniCredit Bank AG
- Universal Stainless & Alloy Products Inc
- Vale International SA
- Voss Group Europe
- Xstrata Nickel

Where did 2010 delegates come from?

- Europe: 45%
- Americas: 17%
- Asia & Australasia: 31%
- Middle East & Africa: 7%
Key topics to be discussed

Stainless steel flat products

- Recovery from the crisis: Lessons learned – actions taken
- Outlook for supply and demand in stainless steel flat products in 2012
- Profits: Volumes are back – but how can profits sustainably be increased?
- Overcapacity: How to best deal with it?
- Mergers: The spin-off of Aperam is an ‘open invitation’ for all competitors. What is possible, and what makes sense? Where are the synergies?
- Imports: How many imports to Europe are healthy?
- Bright spots: Where will the markets grow in the saturated markets of Europe and North America?
- Vertical integration: Learning from the Asians how to organise efficient raw material supply chains?
- Human asset strategy: How can the stainless industry attract the best talents?
- Supply chain: Is mill independent distribution more efficient? Will mills focus on upstream integration rather than downstream investments?
- Substitution: Will ferritics continue to substitute austenitics?
- China: Is anti-dumping the only answer for European mills?
- Could strategic partnerships with non-European producers be an option for the European industry?

End-use panel

- Endless growth possibilities in building & construction
- Renaissance of process equipment: Will the chemical, petrochemical and pharmaceutical industry re-start projects in 2012 after 3 years of under investment and record-profits?
- Stainless steel swimming-pools – a new growth market in Europe
- Stainless steel in food processing equipment: Is the biggest market for austenitic stainless steels on the way to new material solutions? Is McDonalds leading the way?
- Household appliances – how will we cook, wash, clean and dry in 10 years and what does that mean for stainless steel?
- Exhaust systems: A (surprising) growth driver for stainless steel in the coming years
- New grades: Where do we stand on Ni substitution through duplex steels, new ferritics and CrMn steels?
- Do some end use segments need specific promotion by governments, associations or stainless steel mills for further growth?
- Power generation: Does alternative energy bear potential for stainless? Does the nuclear disaster in Japan have a negative impact on stainless in nuclear?
- Exhaust systems: A (surprising) growth driver for stainless steel in the coming years
- New grades: Where do we stand on Ni substitution through duplex steels, new ferritics and CrMn steels?
- Do some end use segments need specific promotion by governments, associations or stainless steel mills for further growth?
- Power generation: Does alternative energy bear potential for stainless? Does the nuclear disaster in Japan have a negative impact on stainless in nuclear?
- Is China a risk or opportunity for European fabricators (a potential Market or only competition)?
- China and India: Future competitors for European process equipment industry?

Risk and financing workshop

- Hedging: Strategies to limit risk from volatile raw material prices
- Financing: Do’s and don’ts in working capital financing
- Does the European specialty steel industry need a ‘stress test’?
- Special steel mills as high-risk creditors – how can the credit ratings be improved?

Technology & productivity workshop

- Innovation is still the key: How does the ‘perfect’ stainless steel mill look like?
- Yields: Measurements to minimize yield losses in flat, long and tubular products
- Environment: Zero waste concepts
- Integrated Plants: DRAP, LC2i, RAP5, etc – The new way to produce stainless or a dead end?
- Secondary melting: Cleaner steels through VIM, VAR, ESR melting – the right way from commodities to high performance stainless steels
- Labour productivity: Is the one man-hr/tonne (output) plant vision only or realistic?

Stainless steel long products

- Why are long products currently more profitable than flat products?
- Outlook for supply and demand in stainless steel long products
- Market drivers in long products: What market segments will outperform in 2012?
- Stainless steel re-bars: A product whose time has come
- Stainless steel bars in oil & gas: An endless growth market for a oil and gas hungry world
- Prepare for the ‘rainy day’: Why long product mills should now (and not later) consolidate their industry
- How can India become the next challenge for European and U.S. Producers?
- Will China become the next challenge for European and U.S. Producers?
- Future role of duplex, super and hyperduplex steels
- Is small beautiful in long products? Comparison of various business models

Tool and engineering steels

- The fastest recovery in any steel segment (+40%): 2010 and 2011 has shown a tremendous turnaround, but what lessons have been learned?
- Outlook for supply and demand in tool and engineering steel products for 2012
- Off-shoring: Will China erode the European and U.S. tool making industry?
- What impact will new car engine concepts have until 2015?
- Consolidation: Schmolz + Bickenbach and BUAG have begun to consolidate this industry through acquisitions. Will there be other companies that have the means to join in, or will it be up to these two groups to reshape this industry?

Raw materials

- Nickel Pig Iron (NPI): A game-changer?
- NPI: Does it have an expiry date from environmental issues?
- Scrap: Will 18-8 scrap take over the majority of Ni input in stainless steels?
- Will Asia learn how to blend stainless steel scrap?
- Ni Expansion Projects: A long story of failures and delays
- Why are Cr fundamentals stronger than Ni fundamentals?
- Chrome: Is South Africa losing its leader role?
- Kazakhstan: The new FeCr powerhouse
- Why quarterly Cr prices become increasingly irrelevant?
- Molybdenum: The ‘spice’ in special steels that simply cannot be replaced
- Thanks to China: Is there a risk that the Western World is cut-off from low cost raw material supply chains?
- Why are European stainless mills still reluctant to invest in raw material sources?
Meet our speakers

Chairman
Markus Moll
SMR – Steel & Metals Market Research

Session I:
Stainless steel flat products

Keynote
Pascal Payet-Gaspard
International Stainless Steel Forum

Julien Onillon
Aperam

Philipp (Kwang-Seuk) Yang
POSCO Europe Office

Kari Parvento
Outokumpu Oyj

Markus Moll
SMR – Steel & Metals Market Research

End-use panel

Thomas Pauly
Euro-Inox

Jens Uhlen
Technoform Glassinsulation GmbH

Karl Angerer
Berndorf Metall – u.Bäderbau GmbH

Siegfried Pießlinger-Schweiger
Poligrat GmbH

Charles-Edouard Vasse
Faurecia Emissions Control Technologies

Oliver Spaltmann
SMR – Steel & Metals Market Research
Meet our speakers

Session II: Raw materials

- Barry Hunter
  Hunter Alloys LLC

- Benno Kratz
  ELG Haniel Trading GmbH

- Paul Desportes
  Eramet

- Carl Landuyt
  Aperam

- Mark Midgley
  ENRC Marketing AG

- Gregory McClain
  Cliffs Natural Resources

Session III: Technology and productivity

- Davide Masoero
  Tenova S.p.A.

- Stefano Martines
  Tenova S.p.A.

- Harald Holzgruber
  INTECO Special Melting Technologies

- Joachim von Schéele
  The Linde Group

- Walter Gebert
  Siemens VAI
Meet our speakers

Optional Workshop
14:00 – 16:00
Moderator: Catherine Markey, LME

Session II:
Stainless steel flat products

Benedikt Zeumer
McKinsey & Company, Inc.

Marc Thümecke
UniCredit Bank AG

Session V:
Stainless steel flat products

Chairman
Wolfgang Emmerich
Böhler Uddeholm AG

Keynote Speaker
Wolfgang Kürbisch
Böhler Edelstahl GmbH & Co. KG

Peter van Hüllen
Georgsmarienhütte Holding GmbH

Oliver Zipper
BGH Edelstahlwerke GmbH

Victor Polard
Eramet Alloy Division

Martin Löwendick
Schmolz + Bickenbach

Stainless & Special Steel
Executive of the Year 2011

Thorsten Studemund
Voss Edelstahlhandel

Sunil Widge
Carpenter Technology Corporation
Fireside chat

Day 1

- Kari Parvento
  Outokumpu Oyj

- Massimiliano Sacco
  Arinox SpA

- Angel Ramirez
  Faurecia Emissions Control Technologies

- Philip (Kwang-Seuk) Yang
  POSCO Europe Office

Day 3

- Peter van Hüllen
  Georgsmarianhütte Holding GmbH

- Franz Rotter
  Voestalpine AG

- Benedikt Niemeyer
  Schmolz + Bickenbach

- Mikael Sthaalros
  Damstahl

- Roberto Marzorati
  Acciai Speciali Cogne SpA

- Neeraj R. Kochhar
  Viraj Profiles Ltd.
Optional delegate tour
Tuesday 6 September 2011
13:30pm onwards (52 people maximum)
Field visit to the Bavarian State Brewery Weihenstephan, the oldest brewery in the world

Day one:
Wednesday 7 September 2011

08:00 Registration desk opens

Session I: Stainless steel flat products
09:00 Chairman’s opening remarks
Markus Moll, Managing Director, SMR – Steel and Metals Market Research, Austria

Keynote presentation:
09:10 Sustainability versus prosperity – a conflict?
What does the stainless steel industry expect from regulation and politics?
Pascal Payet-Gaspard, Secretary General, International Stainless Steel Forum, Belgium

09:40 Back to basics
Julien Onillon, CFO and strategy Stainless and Specialty Steel, Aperam, France

10:10 From an Asian leader to a global champion
Philip (Kwang-Seuk) Yang, Stainless Steel Manager, POSCO Europe Office, South Korea

10:40 Refreshment break

11:10 Outokumpu moving forward
Kari Parvento, Executive Vice President – Group Sales & Marketing, Outokumpu Oyj, Finland

11:40 The story behind the facts and figures
Markus Moll, Managing Director, SMR – Steel and Metals Market Research, Austria

12:10 Networking lunch sponsored by

14:00 Chairman: Markus Moll, Managing Director, SMR – Steel and Metals Market Research, Austria

End-use panel
Process industry and energy: Renewable energy sources – tremendous opportunities for stainless steel
Thomas Pauly, Director, Euro-Inox, Belgium

14:20 Building & construction: Glass insulation spacers – a growing application for stainless steel
Jens Uhlen, Unitmanagement Nordic Countries, Technoform Glass Insulation GmbH, Germany

14:40 Stainless steel swimming pools – an established application with an enormous growth potential
Karl Angerer, Managing Director, Berndorf Metall – und Bäderbau GmbH, Austria

15:00 Surface improvement: New processes to optimize the corrosion resistance of stainless steel
Siegfried Pießlinger-Schweiger, Managing Director, Poligrat GmbH, Germany

15:20 Developments in stainless steel exhaust systems
Charles-Edouard Vasse, Commodity Director Europe, Faurecia Emission Control Technologies, Germany

15:40 Household appliances
Oliver Spaltmann, Senior Market Analyst, SMR – Steel and Metals Market Research, Austria

16:00 Consumer Q & A

16:20 Networking refreshment break

17:00 Fireside chat
Kari Parvento, Executive Vice President – Group Sales & Marketing, Outokumpu Oyj, Finland
Angel Ramirez, Steel Commodity Purchasing Director – Global, Faurecia Emissions Control Technologies, Germany
Massimiliano Sacco, Amministratore Delegato, CEO, Arinox S.p.A., Italy
Philip (Kwan-Seuk) Yang, Stainless Steel Manager, POSCO Europe Office, South Korea
Plus other top executives invited

17:50 Close of day one

18:00 Cocktail networking reception sponsored by
Day two:
Thursday 8 September 2011

08:00 Registration desk opens

Session II: Raw materials
09:00 Chairman’s opening remarks
Barry Hunter, President, Hunter Alloys LLC, USA

Keynote presentation:
09:10 Think global – act local
Benno Kratz, Managing Director, ELG Haniel Trading GmbH, Germany

09:40 The nickel story viewed from its fundamentals
Paul Desportes, Vice president Marketing and Sales Nickel Division, Eramet, France

10:00 Stainless Raw Materials: A post crisis view
Carl Landuyt, Head of Global Purchasing, Aperam, Luxemburg

10:20 Outlook for ferro-chrome
Mark Midgley, Marketing and operations director Ferro Alloys, ENRC Marketing AG, Switzerland

10:40 Panel Q&A

11:00 Networking refreshment break

11:40 The struggle to get new resources into a growing demand Ferro-Alloy market
Gregory McClain, Vice President Ferro-Alloy Marketing, Cliffs Natural Resources, USA

12:00 Best price forecast award 2011 ceremony
Markus Moll, Managing Director, SMR – Steel and Metals Market Research, Austria

12:30 Networking lunch sponsored by

Session III: Technology and productivity
14:00 Chairman’s opening remarks
Markus Moll, Managing Director, SMR – Steel and Metals Market Research, Austria

14:10 Tenova Technologies for energy saving and environmental friendship in the meltshop
Davide Masoero, Steel Technical Sales, Tenova Melt Shops, Tenova S.p.A., Italy

14:30 Remelting technology for high performance steels
Harald Holzgruber, CEO & Managing Director, INTECO Special Melting Technologies GmbH, Austria

15:00 Gas Supply: Creating customer value as a solutions provider to leading stainless steel producers
Jochim von Schéele, Vice President, BOC India – A Member of the Linde Group, India

15:30 New trends to produce STS with an advanced Level 2 system using low cost charging and addition materials
Walter Gebert, Senior Vice President, Siemens VAI Metals Technologies GmbH, Austria

Optional Workshop
14.00-16.00
Managing your exposure to price volatility: How hedging on the LME can help the stainless and special steel markets manage price risk
• Concepts and benefits of hedging
• Hedging with futures – practical examples for the stainless and special steel industries
• What are options? Adding flexibility to your hedging strategies
Catherine Markey, Head of Education & Marketing, London Metal Exchange, UK

16:00 Networking refreshment break

Session IV: The big picture and financing
Chairman: Markus Moll, Managing Director, SMR – Steel and Metals Market Research, Austria

16:30 Facing the new reality
Benedikt Zeumer, Expert Principal, McKinsey & Company Inc., Germany

17:15 Financing special steel mills – a nightmare?
Marc Thümecke, Co-Head Metals & Paper – MFF 1 Managing Director, UniCredit Corporate & Investment Banking, Germany

17:45 Close of day two

18:00 Cocktail networking reception
Day three:
Friday 9 September 2011

Session V: Stainless & special steel long products

09:00 Chairman’s opening remarks
Wolfgang Emmerich, Corporate Strategy, Böhler Uddeholm AG, Austria

Keynote presentation:
09:10 From volume to value
Wolfgang Kürbisch, Vice President Marketing and Sales, Böhler Edelstahl GmbH & Co KG, Austria

09:40 The Future for engineering steels: Risks and Opportunities
Peter van Hülle, Chairman of the Board, Georgsmarienhütte Holding GmbH, Germany

10:10 High performance stainless steel long products in the oil and gas industry – markets, applications and trends
Oliver Zipper, Sales Director bars + semis, BGH Edelstahlwerke GmbH, Germany

10:45 Networking refreshment break

11:30 High speed steels – a global niche market
Victor Polard, Chief Strategy Officer and Powder Business Development, Eramet Alloy Division, France

12:00 Supporting global megatrends with special steel solutions
Martin Löwendick, Head of business development, Schmolz-Bickenbach, Germany

12:30 Honouring ceremony for the stainless and special steel executive of the year 2011

13:00 Networking lunch

14:30 Distribution of stainless steel long products
Thorsten Studemund, Managing Director, Voss Edelstahlhandel, Germany

15:00 New products and moving up the food chain
Sunil Widge, Sr. VP Strategic Business Development and Government Affairs, Carpenter Technology Corporation, USA

15:30 Networking refreshment break

16:00 Fireside chat
Peter van Hülle, Chairman of the Board, Georgsmarienhütte Holding GmbH, Germany
Franz Rotter, Member of the Board of Voestalpine AG, Voestalpine AG, Austria
Benedikt Niemeyer, CEO, Schmolz-Bickenbach, Germany
Mikael Sthaalros, Managing Director and CEO, Damstahl, Denmark
Roberto Marzorati, Vice President, Cogne Acciai Speciali, Italy
Neeraj R. Kochhar, Chairman & Managing Director, Viraj Profiles Ltd, India

16:50 Close of day three and end of the conference

Optional field trip to the Weihenstephan Brewery
Tuesday 6 September 2011, 13:30pm onwards

The Bayerische Staatsbrauerei Weihenstephan, founded in the year 1040, is the world’s oldest brewing place still existing. As a publicly owned enterprise belonging to the Free State of Bavaria, it is managed as a modern company, brewing premium quality beers and successfully distributing them worldwide to 35 countries. The unique combination of tradition and science bestows the brewery the quality standard “Premium Bavaricum” and national and international awards for its “Weihenstephan Beer Specialities”. The guided brewery tour will including a beer tasting session and will be approximately 120 minutes in length. Delegates will be provided with a pretzel and voucher to spend in the beverage shop. The tours would be in English. Places are limited, booking early is advised.

To book: Information will be emailed to you along with your confirmation

Price: €100 – the field trip fees will be donated to the African Medical and Research Foundation (AMREF mUK Charity No: 261488).
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MetalBulletin Events
9th Steel Success Strategies London
17-18 October 2011
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MetalBulletin Events
27th International Ferro-alloys Conference
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<tr>
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<td>€1,699</td>
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<td>Long products &amp; raw materials</td>
<td>€1,799</td>
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<tr>
<td>Full three day conference</td>
<td>€2,199</td>
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Optional delegate tour: To register for the tour information will be emailed to you along with your confirmation

METHODS OF PAYMENT

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