

15th International

Stainless & Special Steel

Summit 6-8 September 2016



**Hotel Intercontinental Lisbon,
Portugal**

Some of our key panellists & speakers:

Olli-Matti Saksi

President, Stainless Coil EMEA, **Outokumpu EMEA GmbH**

Timoteo Di Maulo

CEO, **Aperam**

Markus Meurer

Head of Global Sales and Marketing, **Norilsk Nickel Group**

Carsten A. van der Zander

Head of Global Product Management Stainless Long,
ThyssenKrupp Materials International GmbH

Egidio Bini

Purchasing and Sales Director, **Marcegaglia Specialties**

Roberto Marzorati

Vice-President, **Cogne Acciai Speciali S.p.a.**

Anton Chernykh

President of Management Board and CEO, **SIJ - Slovenian Steel Group**

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Stainless and special steel 4.0

Productivity potentials in our Industry

The last seven years have been tough for the industry, but the worst should now be behind us. Investment cycles on the supply and demand side of the market were largely to blame, first the market was booming as stainless consumers including those in China invested heavily. Then, supply side investments mostly originating in China followed and took raw material prices to new heights.

In 2009 the party was over and the hangover began. Now, seven years later the market has hit the bottom, overcapacity is beginning to decline and consolidation is gaining momentum.

The disruption from China has taught the industry around the world one key lesson: No more luxuries and a strict focus on the bottom-line! Staffing was cut and non-core businesses were given up.

But what now?

Do we wait until improved market conditions bring back profits? Or, do we try to pursue business more intelligently and ask ourselves what are we selling, to whom and how?

Therefore Digitalization and Industry 4.0 provides us with powerful tools to enhance productivity, shorten delivery times and reduce working capital.

This event will once again gather over 200 top executives from all tiers of the supply chain and all major markets to listen to leading players in our industry. This is the perfect platform for networking and face-to-face discussions about critical issues that will shape the success of our industry in the years ahead.

Key topics

Stainless & special steel markets

- Industry 4.0: Productivity enhancement potentials in our industry?
- How will 4.0 change the way we organise the supply chain?
- Where do we stand in the stock cycle?
- Will the positive momentum in Italy and Spain continue?
- What impact will the political crisis of the EU have on the European stainless market?
- Two years of antidumping duties against China and Taiwan – mission accomplished?
- Renaissance of capital goods – healthy orders from petrochemical equipment
- Impact of the building and construction uptick throughout Europe
- Automotive components – an El Dorado for stainless steel bars
- Consolidation in long products Europe – why does it take so long?
- Update on rolled bars and wire rod markets
- Update on forged bar and seamless tube markets
- Is trade action against stainless bar importers expected in Europe?
- The rise of micro-alloyed steels
- What will drive the tool steel market in 2017?
- Update on the oil & gas market
- Update on the quarto plate business
- Trends in premium steel segments? Powder production on the rise?
- Is 3D printing a risk for forged products and castings?

Raw materials

- From surplus to deficit for Nickel, Chrome and Moly this year?
- Stainless scrap shortage: Strategy to deal with less scrap availability of leading stainless producers
- Update on NPI and other Nickel projects
- Are primary molybdenum mines dead?

Technology

- Stainless and Special Steel 4.0 – just a buzzword or real implications?
- Is 4.0 a powerful tool to bring back manufacturing into Europe?
- How do leading CTOs see their companies preparing for the next level of competition?
- What does the optimal stainless steel plant look like?
- What does the optimal engineering steel plant look like?
- How are technology companies reacting to reduced investment activity?

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Optional field trip to the Böllinghaus plant

Friday 9 September - €50 plus Portuguese VAT

The field trip to Böllinghaus Steel's production facilities located in Vieira de Leiria will provide visitors with an insight into a hot rolling mill, which is presently the only one of its kind in Portugal.

You will be given the unique opportunity to learn more about the entire production process – from a glowing bar to the final product. Visitors will also be shown the new production facilities which were erected last year and are part of the development of Böllinghaus. After the visit the field trip participants are invited to have a traditional Portuguese lunch.

Further details are available at www.metalbulletin.com/events/ists and will be provided upon registration. Note: This field trip is only open to registered delegates.

Agenda

DAY ONE

Tuesday 6 September

08:00 Registration desk opens

SESSION I: KEYNOTE PANEL - STAINLESS STEEL FLAT PRODUCTS

09:00 Chairman's opening remarks

Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

09:05 Stainless steel solutions for tomorrow's transport industry

Olli-Matti Saksi, President, Stainless Coil EMEA,
Outokumpu EMEA GmbH, Germany

09:25 Topic to be confirmed

Anton Chernykh, President of Management Board and CEO,
SIJ – Slovenian Steel Group, Slovenia

09:45 Stainless steel structural tubes and profiles: Market trends and new applications

Sami Packalén, Chief Marketing Officer, **Stal tube Oy**, Finland

10:05 Panel Q & A

10:25 Networking refreshment break

SESSION II: TUBE AND PLATE

Chairman

Markus Moll, Managing Director,
SMR- Steel and Metals Market Research, Austria

11:00 Update on the welded tube and pipe market

Egidio Bini, Purchasing and Sales Director,
Marcegaglia Specialties, Italy

11:30 Corrosion resistant plate and clad plate: Applications and market opportunities

Wolfgang Lipp, Managing Director,
SMI – Steel Market Intelligence, Austria

11:50 Panel Q & A

EXECUTIVE OF THE YEAR 2016 AWARD CEREMONY

Moderated by

Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

12:40 Networking lunch - sponsored by **sij** | group

SESSION III: ENDUSE AND DISTRIBUTION

Chairman

Wolfgang Lipp, Managing Director,
SMI – Steel Market Intelligence, Austria

14:00 The North American stainless steel market from a service centre's perspective

Sid Sousa, Vice-President Purchasing, Speciality Products,
Samuel, Son & Co. Limited, Canada

14:20 Diversification - an answer to material volatility?

Pascal Heckmann, Director, Global Supply Chain Management - Commodity Raw Material,
Eberspächer Exhaust Technology GmbH & Co. KG, Germany

14:40 Future needs for emission control systems

Angel Ramirez, Global Purchasing Director,
Faurecia Emission Control Technologies GmbH, Germany

15:00 Surface treatment of stainless steel regarding corrosion resistance and economic viability

Siegfried Pießlinger-Schweiger, Managing Director,
Poligrat GmbH, Germany

15:20 Panel Q & A

15:30 Networking refreshment break

16:00 FIRESIDE CHAT

Moderator: **Markus Moll**, Managing Director,
SMR – Steel and Metals Market Research, Austria

Timoteo Di Mauro, CEO, **Aperam**, Luxembourg
Jürgen Pilarsky, CEO, **Cronimet Holding GmbH**, Germany
Jukka Nummi, President, CEO, **Stal tube Oy**, Finland
Markus Meurer, Head of Global Sales & Marketing,
Norilsk Nickel Group, Russia
Andrea Gatti, CEO, **OSTP Group**, Italy
+ other leading players invited

17:55 Close of day one.

Boat trip & drinks reception sponsored by



DAY TWO

Wednesday 7 September

RAW MATERIALS I

09:00 Chairman's opening remarks

Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

09:05 Keynote presentation: Raw materials for stainless steel – from oversupply to deficit and back?

Frank Ehrenberg, Senior Vice President - Raw Material Procurement, **Outokumpu EMEA GmbH**, Germany

09:25 Nickel perspectives

Barry Jackson, Business Intelligence Manager – Nickel,
AngloAmerican Marketing Ltd., UK

09:45 A view on the nickel market from a producer's perspective

Markus Meurer, Head of Global Sales & Marketing,
Norilsk Nickel Group, Russia

10:05 World nickel market – trends and perspectives

Salvatore Pinizzotto, Director of Market Research and Statistics,
International Nickel Study Group, Portugal

10:25 Panel Q & A

11:00 Networking refreshment break

RAW MATERIALS II

Chairman:

Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

11:30 Update on molybdenum

Barbara Buck, Vice President Marketing & Sales,
Climax Molybdenum Company, USA

11:50 Global overview of the Chrome ore and ferrochrome market

Loïc Racon, Market Research Analyst, **ICDA - International Chromium Development Association**, France

12:10 Processing of stainless scrap – potentials for Industry 4.0

Tobias Kämmer, Managing Director, **Oryx Stainless**, Germany

12:30 Panel Q & A

12:50 BEST RAW MATERIAL PRICE FORECAST AWARD 2015/2016 CEREMONY

Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

13:10 Networking lunch

THE BIG PICTURE PANEL

Chairman:
Oliver Spaltman, Senior Market Analyst,
SMR – Steel and Metals Market Research, Austria

14:20 Where do we go from here? Handling market volatility and operational disruption

Alvaro Polo, Metals and Resources Industries Lead,
Accenture Strategy

14:40 Is long term producer financing still feasible?

Marc Thümecke, Managing Director, Natural Resources – MFR, Financing & Advisory, Corporate and Investment Banking,
UniCredit Bank AG, Germany

15:00 Panel Q & A

15:20 Networking refreshment break

TECHNOLOGY PANEL

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

15:50 Value-based sales & operation planning under changing market conditions, with a focus on specialty steel

Paul Vanvuchelen, Director Customer Solutions,
OM Partners, Belgium

16:10 Primetals advanced automation solutions – a step towards fully automated steelmaking

Gerald Wimmer, Vice President Converter Steelmaking,
Primetals Technologies Austria GmbH, Austria

16:30 Networking refreshment break

16:50 TECHNOLOGY LEADER PANEL: THE FUTURE OF STAINLESS AND SPECIAL STEEL PRODUCTION TECHNOLOGY

Moderator: **Markus Moll**, Managing Director,
SMR – Steel and Metals Market Research, Austria

Walter Gebert, Senior Vice President – Eco Solutions,
Primetals Technologies Austria GmbH, Austria

Thomas Germershausen, Executive Vice President,
Metallurgical Plants and Environmental Technology Division,
SMS Group GmbH, Germany

Vasilij Presern, Advisor of strategy to Executive Board,
SIJ – Slovenian Steel Group, Slovenia

+ other leading players invited

18:00 End of day two

Networking reception sponsored by 

DAY THREE

Thursday 8 September

TOOL AND ENGINEERING STEEL PANEL

09:00 Chairman's opening remarks

Wolfgang Emmerich, Corporate Strategy,
voestalpine Edelstahl GmbH, Austria

09:10 Keynote: Overview of the global tool steel market

Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

09:40 Trends in die casting and extrusion call out for premium tool steel solutions

Martin Löwendick, Chief Sales Officer,
Kind & Co., Edelstahlwerk, GmbH & Co.KG, Germany
Jörn Maubach, Senior Director Sales/ Member of the Executive Board,
Kind & Co., Edelstahlwerk, GmbH & Co.KG, Germany

10:00 Handling with care: Really lovin' steel

Vittorio Boneschi, Technical – Commercial / Quality Area Responsible,
Lucefin Group, Italy

10:20 Panel Q & A

10:40 Networking refreshment break

STAINLESS STEEL LONG PRODUCTS PANEL

Chairman's opening remarks
Markus Moll, Managing Director,
SMR – Steel and Metals Market Research, Austria

11:20 Stainless steel bar for superior machinability

Kari Tuutti, President – Long Products, **Outokumpu Oyi**, Finland

11:40 Offering continuity in a volatile market

Bernd Grotenburg, Commercial Director,
Cogne Acciai Speciali Spa, Italy

12:00 What does it mean to be a synergize and growth partner for ThyssenKrupp Materials Services?

Carsten A. van der Zander, Head of Global Product Management Stainless Long,
ThyssenKrupp Materials International GmbH, Germany

12:20 Panel Q & A

12:40 Networking lunch

Chairman:
Wolfgang Lipp, Managing Director,
SMI – Steel Market Intelligence, Austria

14:00 Industry 4.0 – Challenge for a medium size stainless steel bar producer

Antonio Perea, Chief Sales Officer,
Böllinghaus Steel GmbH, Germany
Hans-Michael Henken, Plant Manager,
Böllinghaus Steel S.A., Portugal

14:20 Aamor-Inox: India's flourishing powerhouse in Stainless Long products

Anand Gupta, CEO, **Aamor Inox Limited**, India

14:40 Panel Q & A

15:00 Networking refreshment break

15:40 FIRESIDE CHAT

Moderator: **Markus Moll**, Managing Director,
SMR – Steel and Metals Market Research, Austria

Kari Tuutti, President – Long Products, **Outokumpu Oyi**, Finland
Roberto Marzorati, Vice-President,
Cogne Acciai Speciali S.p.a, Italy
Jesús Esmoris, CEO, **Tubacex Group**, Spain
Hartwig Härtel, President, **Böllinghaus Steel GmbH**, Germany
Thorsten Studemund, CEO, **Voss Group Europe**, Germany
+ other leading players invited

17:00 Close of conference



Easy ways to register:



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Prices:

Full conference standard rate:

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€2399*

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