

# 15th World Steel Conference

19–21 April 2009 • The Imperial Riding School – Renaissance Hotel, Vienna, Austria

**THE WORLD'S  
LEADING STEEL  
EVENT FOR SENIOR  
EXECUTIVES**

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CONFERENCE PROGRAMME INSIDE 

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All commodity booms in recent times have faltered because of an unexpected weakening of demand. The current commodity crisis is no different, except that the financial crisis has been a catalyst for forces that were already at work. What might have taken months or even years to happen was compressed into a few weeks.

The steel industry finds itself in a volatile market with an unpredictable future. How far will the prices fall and when is this economic downturn likely to end? These are only a few of the questions industry decision makers have to answer in order to formulate a strategy for survival and/or opportunity.

## Topics to be covered and your questions to be answered:

- A macro view of the new world economy
- Understanding China's changing demand
- The super-cycle: Who will re-emerge to race again?
- How far will prices fall?
- Will China's and India's long term steel demand kick start the downward trend?
- How can companies operate with current market prices and costs with a view to continuing their long-term objectives?
- How should companies rethink strategies to adapt to the rapidly changing market place?
- What are the necessary steps that need to be taken to survive a global recession?

Our 15th World Steel conference will seek to provide you with authoritative information from leading steel executives and industry analysts to help you make the right business choices during this commodity crisis. Can you afford to miss the opportunity to be part of this international steel gathering?

# THE WORLD'S LEADING STEEL EVENT

## Sunday, 19 April

19:00 – 20:30 – WELCOME RECEPTION

## Monday, 20 April

09:00 WELCOME  
**Steven Burchell**, Group Manager,  
 Steel Business Unit, *CRU*

### SESSION 1: ECONOMIC CONSEQUENCES AND STRATEGIES FOR SUCCESS

**ECONOMIC GLOBAL OUTLOOK – WHEN WILL RECOVERY COME?**  
**John Walker**, Chairman, *Oxford Economics*

**CONSOLIDATION – KEY STRATEGY FOR WEATHERING UNSTABLE MARKET CONDITIONS**  
**Bill Scotting**, Head of Strategy, *Arcelor Mittal*

**CHINA: CARRYING THE WEIGHT OF THE WORLD OR EXPORTING A WEIGHT TO THE WORLD?**  
**John Johnson**, CEO, *CRU Beijing Office*

**REDEFINING THE ROLE OF PROJECT AND STRUCTURED FINANCE IN STEEL TRADING**  
**Colin Heritage**, Director Trade Finance, *Stemcor Trade Finance Limited*

**RUSSIAN STEEL AND MINING INDUSTRY: REASSURING GLOBAL COMPETITIVENESS IN TIMES OF ECONOMIC CRISIS**  
**Andrey Laptev**, Head of Strategic Planning Department, *Severstal*

### MANAGING PROTECTIONIST RISKS IN A CRISIS

**Dan Horovitz**, Partner, *Holman Fenwick Willan*

LUNCH

**KEYNOTE PRESENTATION**  
**Dr.-Ing. Karl-Ulrich Köhler**, Executive Board Chairman, *ThyssenKrupp Steel AG*

**SURVIVE AND PROSPER THROUGH THE RECESSION**  
**Philip Tomlinson**, Managing Consultant, *CRU Strategies*

**STEEL INDUSTRY IN UKRAINE AND METINVEST SALES STRATEGIES**  
**Andrey Parkhomchuk**, Sales Director, *Metinvest Holding*

**GROWTH PROSPECTS FOR THE MERCHANT SLAB MARKET**  
**Robert Edwards**, Managing Consultant, *CRU Strategies*

**CLIMATE CHANGE AND STEEL**  
**Christopher Beauman**, Senior Advisor, *European Bank for Reconstruction and Development*

**BUILDING ADAPTABILITY, AGILITY AND ALIGNMENT FOR THE NEW STEEL ECONOMY**  
**Dirk Claessens**, Global Leader Metals and Mining, *IBM*

17:00 END OF DAY ONE

## Benefits of attending CRU's 15th World Steel Conference?

- Hear CRU's predictions on demand and supply for 2009 and beyond
- Identify key challenges in order to plan your company strategies
- Understand restraints and opportunities due to recent market collapse
- Gain a good general insight into the worldwide steel industry by learning about key aspects including raw materials, steel mills, finished products, end-users, pricing and risks, and developing markets
- Network with senior level delegates from around the world

“  
**Excellent International Steel Conference with influential newsmakers of the steel industry\***  
 ”

\* Quote from recent CRU Steel Conference

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# FOR SENIOR EXECUTIVES

“An excellent opportunity to meet with and to hear from some of the brightest minds in the steel industry”

**Tuesday, 21 April**

## SESSION 2: DEMAND OUTLOOK

09:00 **A GLOBAL EPCM PERSPECTIVE**  
**Lisa Haley**, Executive Director,  
Procurement EAME, *Fluor*

**THE OUTLOOK FOR WORLD STEEL SHEET MARKETS**  
**Chris Houlden**, Senior Consultant Steel,  
*CRU Analysis*

**TURMOIL AND CHANGE IN THE GLOBAL AUTOMOTIVE INDUSTRY**  
**Pete Kelly**, Senior Director, European  
Forecasting, *J.D. Power and Associates*

## SESSION 3: RAW MATERIAL OPPORTUNITIES AND CONSTRAINTS

**KUMBA: A STRATEGIC SUPPLIER IN EUROPE, CO-CREATING VALUE WITH ITS CUSTOMERS**  
**Dr Timo Smit**, Head, Commercial,  
*Kumba Iron Ore*

**METALLURGICAL COAL AND COKE MARKET OVERVIEW**  
**Andrew Todd**, Consultant, Steel Raw Materials,  
*CRU Analysis*

**DRI WORLD**  
**Amit Majumdar**, Managing Director,  
*Minmet Resources International, GDA*

LUNCH

## THE GLOBAL METALLICS MARKET OUTLOOK

**Gavin Montgomery**, Consultant,  
Steel Raw Materials, *CRU Analysis*

**GRANGE RESOURCES – SURVIVING THE DIP AS AUSTRALIA'S LARGEST MAGNETITE PRODUCER**  
**Russell Clark**, Managing Director & CEO,  
*Grange Resources*

## SESSION 4: MANAGING RISK

**MANAGING STEEL PRICE RISK IN A YEAR OF UNCERTAINTY**  
**Paul Shellman**, Steel Consultant, *CME Group*

## Workshop

15:00  
**PRICE RISK MANAGEMENT OVERVIEW**  
Presenter: **Jim Southwood**, President,  
*CRU Price Risk Management*

This will be free for all attendees.

NETWORKING COFFEE BREAK

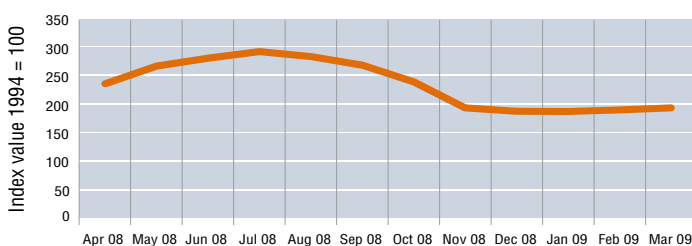
17:00 CLOSE OF CONFERENCE



## Conference Venue

**The Imperial Riding School – Renaissance Hotel** reflects the imperial past of the Austrian capital. History is omnipresent in this vibrant metropolis of art and music. Feel a piece of this imperial history in our ancient, neo-classic Vienna hotel – a former horse riding school in 1850. Situated in the diplomatic area, close to Vienna city centre, our conference hotel offers the ideal location for business travel.

## Where next for steel prices?



CRU Global Steel Prices Index 2008/09

## Sponsorship and Exhibition Opportunities

Sponsoring an element of the conference, or taking an exhibition stand, will offer significant brand exposure in front of a prestigious and influential audience of decision makers involved in the world steel industry.

If you feel that your company would benefit from this type of high profile exposure, please contact Marilyn Portner to discuss the remaining sponsorship and exhibition packages:

Telephone +44 20 7903 2402  
Email [marilyn.portner@crugroup.com](mailto:marilyn.portner@crugroup.com)

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# 15th World Steel Conference

19-21 April 2009 • The Imperial Riding School – Renaissance Hotel, Vienna, Austria

Please register me for the **15th World Steel Conference** at the rate of:

- £895 / \$1835 / €1250 – by 13 March 2009
- £995 / \$2040 / €1395 – after 13 March 2009
- This registration is part of a **Discounted Group Booking**
- I am interested in sponsorship and/or exhibition opportunities
- I cannot commit just yet but please send me further information

## REGISTRATION DETAILS

Mr  Mrs  Miss  Ms  Dr  Prof  Other \_\_\_\_\_

Family name \_\_\_\_\_ Forename(s) \_\_\_\_\_

Email address \_\_\_\_\_

Job title \_\_\_\_\_

Company name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Zip/Postcode \_\_\_\_\_ Country \_\_\_\_\_

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## PAYMENT DETAILS Please send payment with your registration

I am from an EU country and my sales tax number is:

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## Contact details

**Tel: +44 20 7903 2410**  
**Fax: +44 20 7903 2432**  
**Email: [conferences@crugroup.com](mailto:conferences@crugroup.com)**

## CONFERENCE INFORMATION

### Register Online

You can also register for this conference online at [www.worldsteelconference.com](http://www.worldsteelconference.com). Please quote the registration code at the bottom of this form.

### Discounted Group Booking

**Arrange a Group Booking and Receive up to 20% Discount.** By registering a group booking you will enjoy the following discount rates on each delegate:

Second delegate: **10% discount**  
 Third delegate: **15% discount**  
 Fourth delegate plus: **20% discount**

All registration forms must be sent together and paid for with the same credit card to qualify for a group discount. If registering online please make sure to add all delegates when completing group booking.

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Third delegate: **15% discount**

Fourth delegate plus: **20% discount**

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### Hotel Details

Reduced hotel rates are available to conference delegates at the The Imperial Riding School – Renaissance Hotel. On receipt of your conference registration form, we will send you a hotel reservation link.

### Social Events

Many social events will be arranged throughout the conference. Please visit our website for further details.

### Sponsorship Opportunities

For **sponsorship and exhibition opportunities** contact Marilyn Portner on tel: +44 20 7903 2402 or email: [marilyn.portner@crugroup.com](mailto:marilyn.portner@crugroup.com)

### Terms of Booking

#### Payment Policy

Registrations can only be confirmed upon receipt of payment or proof of payment and discounted fees will only apply when payment is received within the offer period. If payment is not received before the conference, delegates will be asked to guarantee payment at registration with a personal credit card. Late payments made after the conference will be subject to an additional administration fee of GB£80.00/US\$165.00/€110.00.

#### Cancellation Policy

Cancellations must be received in writing prior to 19 March 2009 to qualify for a full refund less GB£80.00/US\$165.00/€110.00 administration fee. It may be necessary for reasons beyond the control of the organisers to alter content, timing and venue. In the unlikely event of the conference being cancelled or curtailed due to any reasons beyond the control of CRU Events, or it is necessary or advisable to relocate or change the date and/or location of the event, neither CRU Events, nor its employees will be held liable for refunds, damages and/or additional expenses which may be incurred by delegates. We therefore recommend prospective delegates to arrange appropriate insurance cover.

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**Please fax this form to:**  
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