

# 9th International Stainless & Special Steel

## Summit

7-9 September 2010 • The Westin Excelsior, Rome, Italy

## The Event Where The Market Talks

### Hear from key industry-leading speakers:

- **Harald Espenhahn**, ThyssenKrupp Acciai Speciali Terni S.p.A., Italy
- **Antonio Marcegaglia**, Marcegaglia S.p.A., Italy
- **Bernardo Velazquez**, Acerinox S.A., Spain
- **Juha Rantanen**, Outokumpu Oy, Finland
- **Martin Abbott**, London Metal Exchange, UK
- **Alvaro Videgain**, Tubacex S.A., Spain
- **Karl Haase**, Deutsche Edelstahlwerke, Germany
- **Ernesto Amenduni**, Centro Inox, Italy
- **Michael Wright**, ELG Haniel Metals, UK
- **Jim Lennon**, Macquarie Capital, UK
- **Roberto Marzorati**, Cogne Acciai Speciali, Italy
- **Remy Behra**, Faurecia Exhaust Systems, France
- **Chris Zweifel**, Franke Foodservice Systems, USA
- **Gert Nilson**, Uddeholms AB, Sweden
- **Pete Dow**, ITW Food Equipment Group, USA
- **Alessandro Fraccia**, Rodacciai S.p.A., Italy

**“Exceptional networking and content.”**

ISSF, Belgium

**“Excellent opportunity for factual up-dates and outlook. Great networking.”**

Damstahl AS, Demark



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Providing special steel solutions



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BRITISH STAINLESS  
STEEL ASSOCIATION



*Metal Bulletin Events' and SMR's 9th International Stainless & Special Steel Summit* is the event where the market talks. The market leaders in global stainless steel come together to debate the new paradigms for the industry in the post-recession world.

No other stainless steel conference offers such networking opportunities nor such cutting edge content and debate. With international industry leaders setting out their agenda for 2011, any serious player in stainless steel cannot afford to miss out.



## Benefits of attending Learn...

...how the stainless steel industry is adjusting its production and business strategies as we emerge from the crisis

## Participate...

...in top-level interactive debates on the most pressing questions facing the industry today - to help you make better informed business decisions taking you safely through the next twelve months

## Network...

...with key decision-makers and market-shakers in the stainless steel industry

## Innovation is the key

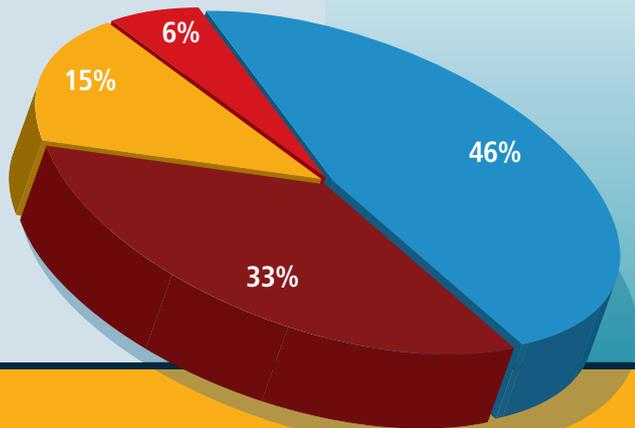
Rome will be the largest gathering of commercial stainless and special steel executives in 2010. Thus it will be the place 'where the market talks'. Leading industry experts will address topics that are at the core of our industry:

- Market Development: Where can stainless steel win new applications from alternative materials?
- What can other markets learn from the Italian success story?
- How can the European welded tube and pipe producers remain competitive?
- Does it pay off to have a global production base for stainless steel producers?
- How much own distribution shall a stainless steel mill have?
- Distribution: What is the optimal size and warehouse system in Europe and North America?
- Consumers: How do consumers in major industry segments (food service, automotive, process equipment, building and construction) see the road to recovery?
- Where do they think that their suppliers can improve, where is innovation really needed?
- Raw Materials: LME – friend or foe of our industry?
- When will the stainless steel scrap tightness ease?
- Nickel: Are all new projects delayed and will PAL ever work? How much more NPI has to be expected in China?
- Is Nickel substitution running out of steam?
- Technology & Productivity: What technical innovations keep stainless steel competitive?
- What cost-cutting measures create value?
- Financing and Risk Management: How can this industry overcome the volatility problem and regain its attractiveness for investors?
- Long Products: Is protectionism the right answer to re-establish profitability in Europe and the USA?
- Why is consolidation lagging behind in long products?
- Seamless Tube: When will the key markets - power generation, oil and gas, process equipment - recover?
- Special Steels: Does it pay off to be a global player?
- When will we reach pre-crisis levels in tool steels?
- Did the crisis accelerate, or slow, the offshoring in the tool-making industry?
- What position can Chinese producers get in Europe and North America?
- How to deal with the enormous overcapacity in forged products?
- What realistic opportunities are there for low nickel grades (PH, duplex, lean duplex and martensitic) to substitute 300 series in long products?

## Over 200 delegates attended in 2009

### Where did 2009 delegates come from?

Asia & Australasia	46%
Europe	33%
Americas	15%
Middle East & Africa	6%



## Just a few of the companies who registered in 2009

- Acciaierie Valbruna SpA
- ArcelorMittal
- BOA
- Boellinghaus GmbH + Co KG
- Bohler-Uddeholm
- Centravis
- Cogne Acciai Speciali Srl
- Cronimet GMBH
- Damstahl GmbH
- Deutsche Edelstahlwerke GmbH
- DKC Europe
- ELG Haniel Metals Ltd
- Eramet
- FA Breitenfeld Edelstahl AG
- Faurecia Exhaust Systems
- Georgsmarienhuetten GmbH
- Gloria Material Technology Corp
- Gruppo Inox SpA
- Hagener Feinstahl GmbH
- Hempel Special Metals AG
- Ibero Stahl GmbH
- Inox A/S
- ISSF
- Latrobe Specialty Steel
- MCB Nederland BV
- Metal Ravne d.o.o.
- Mukand Ltd – Stainless and Alloy Steel
- Nippon Yakin Kogyo Co Ltd
- Norilsk Nickel
- Oryx Stainless AG
- Outokumpu Stainless
- Posco
- Posco Specialty Steel
- Salzgitter Mannesmann Stainless Tubes GmbH
- Sandvik Materials Technology
- Sauter Edelstahl AG
- SCHMOLZ + BICKENBACH Edelstahl GmbH
- SMS Siemag AG
- Stappert Spezial Stahl Handel GmbH
- Sulzer Chemtech AG
- Sumitomo Corporation
- ThyssenKrupp Mannex GmbH
- Ugitech
- Universal Stainless & Alloy Products Inc
- Vale Inco Europe Limited
- Viraj Group
- Voss Edelhthalhandel GmbH & Co KG
- Walzwerke Einsal GmbH
- Xstrata Nickel Intl Ltd
- Zapp Precision Wire

# 9th International Stainless & Special Steel Summit

## Day One: Tuesday, September 7

08:00 Registration desk opens

### Session I: Stainless Steel Flat Products

#### Welcome address:

09:00 **Phillip Price**, Editor, Metal Bulletin, UK  
Chairman: **Markus Moll**, Managing Director,  
SMR – Steel and Metals Market Research, Austria

09:05 Opening remarks  
**Fausto Capelli**, Managing Director, Centro Inox, Italy

#### Keynote presentation:

09:10 Innovation is the key  
**Harald Espenhahn**, Managing Director,  
ThyssenKrupp Acciai Speciali Terni S.p.A., Italy

09:40 Size matters in welded tube and pipe?  
– Perspectives of the market leader  
**Antonio Marcegaglia**, CEO  
Marcegaglia S.p.A., Italy

10:10 The Italian market – a success story  
**Ernesto Amenduni**, President,  
Centro Inox, Italy

10:40 Networking coffee break

11:10 Acerinox – the gentle giant  
**Bernardo Velazquez**, Managing Director,  
Acerinox, S. A., Spain

11:40 Distribution – a challenge without frontiers  
**Roberto Vender**, CEO,  
Gruppo Inox Spa, Italy

12:10 Honoring ceremony for the Stainless Steel Executive of the year 2010

12:30 Networking lunch

14:00 Chairman's opening remarks  
**Phillip Price**, Editor,  
Metal Bulletin, UK

14:05 Outokumpu's focus on end-use markets  
**Juha Rantanen**, CEO and President,  
Outokumpu Oy, Finland

#### End-use panel:

14:35 Stainless steel in catering systems  
**Chris Zweifel**, Vice President Technology and Standards,  
Franke Foodservice Systems, USAf

14:55 Stainless steel in exhaust systems  
**Remy Behra**, Global Purchasing Commodity Manager,  
Faurecia Exhaust Systems, France

15:15 Stainless steel in process equipment  
**Stefano Boccolari**, Manager Design Support & Claims,  
Tetra-Pak Packaging Solutions S.p.A., Italy

15:35 Stainless steel in architecture  
**Claudio Danesin**, R&D Manager,  
Permasteelisa Interiors, Italy

15:55 Stainless steel in food equipment  
**Pete Dow**, Director of Strategic Sourcing,  
ITW Food Equipment Group, USA

16:10 Q & A with all consumers

16:30 Networking coffee break

#### Fireside chat:

17:00 Roundtable Discussion with:  
**Harald Espenhahn**, Managing Director,  
ThyssenKrupp Acciai Speciali Terni S.p.A., Italy

**Juha Rantanen**, CEO and President,  
Outokumpu Oy, Finland

**Antonio Marcegaglia**, CEO,  
Margegaglia, Italy

**Gianandrea Sassoli**, Executive Vice President &  
General Manager, **Sarinnox Metalli**, Italy

**Rafael Naranjo**, Chairman and CEO,  
Acerinox S. A., Spain

**Jean-Yves Gilet**, Executive Vice President - CEO,  
ArcelorMittal Stainless, Belgium

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

17:50 Close of day one

18:00 Cocktail networking reception

## Day Two: Wednesday, September 8

08:00 Registration desk opens

### Session II: Raw Materials

09:00 Chairman's opening remarks  
**Markus Moll**, Managing Director,  
SMR – Steel and Metals Market Research, Austria

#### Keynote presentation:

09:05 Nickel – A partner for the stainless steel industry for almost 100 years

**Jim Lennon**, Executive Director Senior Commodities Strategist,  
Macquarie Capital (Europe) Ltd, UK

09:35 Scrap – the flexible link in the stainless steel value chain  
**Michael Wright**, CEO,  
ELG Haniel Metals Ltd., UK

10:05 Stainless steel scrap  
– challenges in a volatile market environment  
**Tobias Kämmer**, CEO,  
ORYX Stainless, Germany

10:30 Networking coffee break

11:00 The global outlook for ferro-chrome  
**Adam Panayi**, Metals Analyst,  
Metal Bulletin Research, UK

11:30 Vanadium & Sustainability in metals recycling  
**Christian Hauler**, Managing Director  
– Business Unit Steel and Foundry Industry,  
Treibacher Industrie AG, Austria

12:00 Award Ceremony for the best raw material price forecast 2010

12:30 Networking Lunch

## Field Trip

13:15 Departure for Field Trip

ThyssenKrupp Acciai Speciali Terni & Società delle Fucine s.r.l.

*The field trip will run simultaneously with workshops one and two, but will return to the conference hotel in time for the cocktail reception.*

## Workshop one: Technology & Productivity

14:00 (Alternatively to field trip)

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

**Wilhelm Karner**, Head of Projects and Sales, Andritz, Austria

**Alois Czipin**, Managing Partner, Alois Czipin Produktivitätsberatung GmbH, Austria

15:00 Networking coffee break

## Workshop two: Risk Management & Financing

15:30 (Alternatively to field trip)

Moderator: **Phillip Price**, Editor, Metal Bulletin, UK

**Martin Abbott**, Chief Executive, London Metal Exchange, UK

**Andreas Schober**, Global industry leader machinery, metals, construction, risk management corporate & PB Credit Risks Area, Unicredit S.p.A., Germany

16:30 Close of day two

18:00 Cocktail networking reception

## Day Three: Thursday, September 9

### Session III: Stainless Steel Long Products & Special Steels

09:00 Chairman's opening remarks

**Phillip Price**, Editor, Metal Bulletin, UK

#### Keynote presentation:

09:05 Innovative solutions for challenging applications of stainless steel long products

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

09:35 Cogne investing in high value market segments

**Roberto Marzorati**, Vice President, Cogne Acciai Speciali, Italy

09:55 Seamless tube and pipe:

being successful in a highly challenging market segment  
**Alvaro Videgain**, Chairman & CEO, Tubacex, S. A. Spain

10:30 Networking coffee break

11:00 The Rodacciai Group – a flexible partner for stainless steel distributors and end-users

**Alessandro Fraccia**, Managing Director, Rodacciai S.p.A., Italy

11:30 Stainless steel hot rolled flat bars:

A crucial component for innovative products

**Eduardo José Carregueiro**, Production and Technical Plant Manager, Böllinghaus Stahl, Portugal

12:20 Networking Lunch

13:30 Chairman's opening remarks

**Wolfgang Emmerich**, Vice President Corporate Strategy, Böhler Uddeholm, Austria

#### Keynote presentation:

14:00 Innovations for special steel solutions

**Karl Haase**, CEO, General Manager, MD, DEW - Deutsche Edelstahlwerke, Germany

14:30 Uddeholms unique value proposition to the tool making industry

**Gert Nilson**, Vice President R&D, Uddeholms AB, Sweden

15:00 Successful in the crisis?

– The long road to recovery

**Andreas Scharf**, Managing Director, Stahl Gröditz, Germany

15:30 Networking coffee break

16:00 Large Forgings Production:

Future challenges from the energy market

**Massimo Calderini**, Managing Director, Società delle Fucine s.r.l., Italy

16:30 Innovative tooling solutions for customers

**Daniel O'Leary**, National Sales Manager, Crucible Industries LLC, USA

#### Fireside chat:

17:00 Roundtable Discussion with:

**Benedikt Niemeyer**, CEO, Schmolz + Bickenbach, Germany

**Roberto Marzorati**, Vice President, Cogne Acciai Speciali, Italy

**Dennis Oates**, President and CEO, Universal Stainless and Alloy Products, USA

**Karl Haase**, CEO, Deutsche Edelstahlwerke, Germany

**Wolfgang Emmerich**, Vice President Corporate Strategy, Böhler Uddeholm, Austria

**Massimo Amenduni**, Managing Director, Acciaierie Valbruna S.p.A., Italy

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

17:50 Close of day three and end of conference

# Sponsorship and Exhibition Opportunities

Reach out to international decision-makers at the **9th International Stainless and Special Steel Summit**. Taking a sponsorship option or exhibition stand is the most cost-effective and targeted way of reaching the International Stainless and Special Steel community.

## Sponsorship Opportunities

Showcase your company at the **9th International Stainless and Special Steel Summit**. Sponsoring an element of the event ensures your company features at the forefront of the conference. Join us and illustrate your company's expertise and competitive edge to the key decision-makers in the International Stainless Steel industry.

Raise your company profile before, during and after the event using our unique sponsorship options. Sponsorship offers longevity and packages are tailored so that your company can gain exposure from the time of inception to the event itself. By taking a sponsorship option at the event, you will have your logo displayed on the main conference stage and create an opportunity for potential clients to contact you by showcasing your company details in the delegate documentation and on the conference website with a hyperlink to your corporate homepage.

We can customise a variety of options to suit your budget, objectives and aspirations, examples include:

### Welcome Reception

Network and welcome potential clients with your branding prominent

### Host a Delegate Lunch

Entertain a large number of existing and potential clients

### Coffee Break Sponsor

Get your message across with high visibility branding

### Delegate Bag Sponsor

Your company logo on the move for maximum effect

### Brochure Distribution

Ensure your message is communicated to all the delegates

## Exhibition Opportunities

The International Stainless and Special Steel exhibition area acts as the heart of the networking activity and provides the perfect opportunity to showcase your company, services and achievements whilst establishing business contacts and ensuring your clients know where to find you.

Exhibiting at the conference is an investment into your company's future success; it will provide you with the ultimate tool to achieve your goals by delivering a targeted audience.

As an exhibitor you will have the opportunity to:

- Network and do business with industry decision makers
- Target new customers, build and reinforce relationships
- Create greater company exposure
- Showcase your products, services and achievements
- Launch a new company, service or product
- Increase your sales
- Attend the conference and improve your industry knowledge
- Relax and enjoy communicating with colleagues old and new at the evening receptions



To find out more about tailored sponsorship or exhibition packages, please contact

**Manjit Sandhu**

Call: + 44 (0) 20 7779 8188

Email: [msandhu@metalbulletin.com](mailto:msandhu@metalbulletin.com)

## Delegate Messenger System

Networking Opportunities - would you like to be able to communicate with other delegates before the event?

You can! With our unique Delegate Messenger System that gives you the chance to speak to other registered delegates from one month before the event – an ideal opportunity to set up important business meetings at the event.

Book early to ensure instant access when it goes live on 9 August 2010.



## Related forthcoming 2010 events

### 13th Central & Eastern European Steel Conference

13-14 September, Prague, Czech Republic

[www.metalbulletin.com/events/cees](http://www.metalbulletin.com/events/cees)

Over 200  
expected  
delegates

### 26th International Ferro-alloys Conference

14-16 November, Berlin, Germany

[www.metalbulletin.com/events/fa](http://www.metalbulletin.com/events/fa)

Over 1000  
expected  
delegates

### 8th Steel Success Strategies Europe

29-30 November, London, UK

[www.metalbulletin.com/events/ssse](http://www.metalbulletin.com/events/ssse)

Over 200  
expected  
delegates

### 14th Middle East Iron & Steel Conference

13-15 December, Dubai, UAE

[www.metalbulletin.com/event/meis](http://www.metalbulletin.com/event/meis)

Over 500  
expected  
delegates

# 9th International Stainless & Special Steel Summit

Register ONLINE  
& SAVE €100  
on the prices below

## DELEGATE DETAILS

To register additional delegates please photocopy this form

\_\_\_\_\_

If your details above are incorrect please amend them here

PLEASE COMPLETE IN BLOCK CAPITALS

(Mr/Miss/Mrs/Ms/Dr) \_\_\_\_\_

Family Name: \_\_\_\_\_

First/Given Name: \_\_\_\_\_

\*Delegate Email: \_\_\_\_\_

\*Administrator Email: \_\_\_\_\_

Position in Company: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Postal/Zip Code: \_\_\_\_\_

Country: \_\_\_\_\_

Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

Please indicate your metals interest in order of preference:

1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_

What is your company's main business activity:  
\_\_\_\_\_

\*Delegates must provide their email address in order to receive booking confirmation and access to the delegate messenger system.

## REGISTRATION RATES

Please tick a box to select

Modules:	Before: 30 May '10	Before: 30 July '10	Thereafter
Flat Products & Raw Materials	€1,199 <input type="checkbox"/>	€1,399 <input type="checkbox"/>	€1,599 <input type="checkbox"/>
Long Products & Raw Materials	€1,299 <input type="checkbox"/>	€1,499 <input type="checkbox"/>	€1,699 <input type="checkbox"/>
Full Conference	€1,599 <input type="checkbox"/>	€1,799 <input type="checkbox"/>	€1,999 <input type="checkbox"/>

## METHODS OF PAYMENT

PLEASE SIGN THE FORM IN ORDER FOR REGISTRATION TO BE PROCESSED

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

To make a payment by credit card, please call  
+44 (0) 20 7779 7999 or visit  
[www.metalbulletin.com/events/iss](http://www.metalbulletin.com/events/iss) to book and pay online

I would like to pay by bank transfer.  
Option only available before 10th August 2010.

Note: Full bank details will be emailed to you with your booking confirmation. When paying by bank transfer, please ensure that you transfer enough funds to cover the full price of your purchase, plus any bank charges you may incur.

**IMPORTANT:** Please make sure you quote your full invoice number, details can be found on your invoice.

Metal Bulletin standard terms and conditions apply.

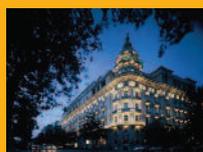
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Please tick if you are not registered for sales tax.

Visas are the responsibility of delegates.

Code: WEB



## Venue

The Westin Excelsior, Rome, Italy

Via Vittorio Veneto 125, Rome, 00187, Italy

Phone: (+39) 06 47081

For more information, please visit the website:

<http://www.starwoodhotels.com/westin/property/overview/index.html?propertyID=70>

**Booking your accommodation:**

Upon registration, delegates will be emailed an accommodation booking form along with their confirmation to be completed and returned to the hotel.

## Easy ways to register

Metal Bulletin Events Tel: + 44 (0) 20 7779 8989 Fax: + 44 (0) 20 7779 8294 Email: [marketing@metalbulletin.com](mailto:marketing@metalbulletin.com)

CC Booking Hotline: + 44 (0) 20 7779 7999 Address: Metal Bulletin Events, Nestor House, Playhouse Yard, London, EC4V 5EX, UK

Online: [www.metalbulletin.com/events/iss](http://www.metalbulletin.com/events/iss)

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### BOOKING CONDITIONS

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 you are not able to attend, a substitute delegate will be accepted. Cancellations must be received in writing prior to 28 days before the conference to qualify for a full refund less €135 administration fee. It may be necessary for reasons beyond the control of the organisers to alter the content, timing and venue. In the unlikely event of the conference being cancelled or curtailed due to any reason beyond the control of Metal Bulletin Ltd., or it is necessary or advisable to relocate or change the date and/or location of the event, neither Metal Bulletin Ltd., 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.